

# FBO.GOV Location Admin 1.6

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# 1 System Overview

The system is a web-based portal which allows vendors to review Federal Procurement Opportunities over \$25,000.

**All Users:** From the site's main navigation page, any user (not password protected) can utilize navigation to review:

- General Information
- News
- Opportunities
- Agencies / Offices Lists
- Privacy Statement

**Government Users,** when logged in using their password protected account can do the following:

- **Buyers:** Possess key system functionality as outlined below:
  - Maintain Buyer Profile. Buyers can be set up to be agency, or specific contracting office, buyers.
  - Create, Modify/Amend, or Cancel an Opportunity Notice.
  - Manage document package content, and vendor accessibility to package documents, that support opportunities. Buyers can upload non-sensitive docs (and attach existing sensitive, but unclassified docs to notices)
  - Buyers can create non-fbo solicitation links. These links create document packages that are not tied to FBO solicitations (parallels functionality previously found in the FedTeds system). With this feature, the buyer is able to create a clickable link that can be used in other systems/documents. When clicked by a vendor, the vendor is taken to a system interface where their authorization to review materials (explicit access / export controlled) is vetted prior to letting the vendor access the materials.
- **Engineers:** This user group can post / update sensitive, but unclassified documents for use as attachments to Opportunities. Engineers, unless also designated to be a buyer, cannot post or manage opportunities. **NOTE:** Every user is registered for a particular agency/office and usually location, which includes engineers. Buyers of the same office will see unattached technical packages when posting notices for attachment. Buyers can also search by PR#, a technical package field, to find packages submitted for any office that is unattached, but a user must know the #PR# to find it.
- **Buyer/Engineer:** A user can be given both Buyer and Engineer user rights. This allows a single user to both post secured, but unclassified documents and to create solicitations.
- **Location Administrators:** Users that have the authority to authorize an agency's staff member as being able to post opportunities in the system. Location Administrators are also able to post opportunities for their agency.
- **Super User:** Users with system oversight and administrative rights.

**Vendors,** when logged in using their password protected account can do the following:

- Vendor Profile: Vendors maintain profiles in the system streamlining use of the portal. Among other profile elements, the following key vendor information is maintained in their profile:


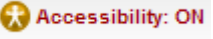

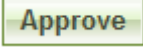
- **DUNS (Data Universal Number System) Number**
  - **Commercial and Government Entity (CAGE) Code**
  - **MPIN (Marketing Partner Identification Number)** – Optional profile field required to view sensitive materials.
- Vendor Opportunity Review Features: Vendor can search for opportunities based on the following terms:
    - keyword search
    - opportunity/procurement type
    - posting date
    - response deadline
    - last modified date
    - place of performance zip code
    - set-aside code (“set aside” solicitations allow only specified business concerns)
    - classification code
    - NAICS (North American Industry Classification System) code
    - agency/Office(s)






Vendor can set up “search agents” based on detailed search elements, which highlight newly added opportunities which align with their search criteria. Vendor can add opportunities to a “watch list” list (akin to a “favorites” list”). Per the vendor’s profile status, vendor can review documents associated with the opportunity (Packages).


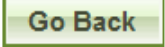







- Opportunity Actions: Vendor is able to add themselves to the “interested vendors list” for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors can request explicit access to view secured, but unclassified with explicit access designation. Additionally, if the vendor’s profile indicates that the vendor is eligible for access to export controlled packages, the system allows the vendor access.

## 1.1 Definition of key terms


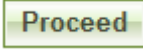
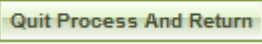

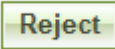






Below is a list of key terms and how they are used throughout the system.


Term	Icon	Description
Accessibility	 or 	Accessibility Mode – Disables select interface enhancements to ensure users of assistive technologies have full and equal access to all aspects of this web site. Icon is “red” if accessibility mode is “on” or “blue” if accessibility mode is “off”.
Account	n/a	From an “account,” a user is designated as a engineer for a particular agency or office. Because some engineers are associated with multiple agency’s/offices, they will have multiple accounts tied to their username.
Add Office Location		Allows admin to insert office location for Agency.
Active Notice	n/a	Notice that is open for vendor review/response.
Approve		The “Approve” button is used to approve a vendor’s request for explicit access to sensitive, but unclassified documents.
Audit Trail	n/a	For sensitive, but unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the “audit trail” sub-tab of a released document.
Authorized Party	n/a	Certain sensitive, but unclassified package(s) require that a vendor be explicitly authorized to review the materials. A government user can pro-actively select a vendor user for access, or a vendor can request, and be granted access, through this system. Once the vendor is given explicit access to review the package, they are an “authorized” party.
Authorized Vendor	n/a	Export Controlled requires that the vendor’s company be certified by the Defense Logistics Information Service Joint Certification Program to receive unclassified technical data disclosing military critical technology with military or space application. Those vendors that are certified to receive export controlled materials are termed “authorized vendors.” This system receives a daily feed of authorized vendors, which determines access based on a vendor’s Cage code/MPIN.
Buyer	n/a	Government user that is presenting an opportunity notice in the system.
Cage Code	n/a	Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies companies doing, or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second,

		third and fourth may be any mixture of alpha/numeric excluding I and O. All positions are non-significant. The code provides for a standardized method of identifying a given facility at a specific location.
Cancel Notice		Notice that has been cancelled. Does not go to archives until archive date for the notice.
Clear		The "Clear" button appears when a users is using search filters. If selected, the system "clears" any previously entered search filters.
Create Award Document		Add designation of the contract award recipient. "Document" is a single attachment (either link or uploaded document) that can be attached to a "Notice". A collection of documents can be bundled to create a "Package"
Document	n/a	"Document" is a single attachment (either link or uploaded document) that can be attached to a "Notice". A collection of documents can be bundled to create a "Package"
Draft		Saved, but not necessarily complete. Drafts are not viewable on vendor interface.
DUNS	n/a	DUNS (Data Universal Number System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central Contract Registration) prior to the award of a contract; basic agreement, basic ordering agreement, or blanket purchase agreement. According to FAR 52.204-7, to register in CCR, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
Edit		Open record for edits.
Engineer	n/a	User that can post / update sensitive, but unclassified documents for use as attachments to Opportunities. Engineers are registered for a particular agency/office and usually location. Buyers of the same office will see unattached technical packages when posting notices for attachment.
Explicit Access	n/a	Vendor is given explicit access to review sensitive, but unclassified package(s). A government user can pro-actively select a vendor user for access, or a vendor can request, and be granted access, through this system.
Export Controlled	n/a	Export Controlled requires that the vendor's company be certified by the Defense Logistics Information Service Joint Certification Program to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's Cage

		code/MPIN.
Form	n/a	Any screen where a user enters data that is saved in the system.
Go		If data is entered in keyword search filter, select the "Go" button to submit the request.
Go Back		During a stepwise process, use of the "go back" button takes the user back one step in the process.
Help	 or 	Throughout the system, the system presents users with the opportunity review system "Help" messages. The icons presented here will take the users to the help message that is available.
Insert Child Agency		Allows admin to insert sub-agency in an Agency hierarchy.
Interested Vendor	n/a	If a notice is set to allow for either of these features (note the features are set by the buyer), vendors will be allowed to do the following: 1) indicate interest in a particular notice, 2) review the listing of interested vendors for a notice (i.e., potential list of targets for potential collaboration).
Log-in		Use username and password to logon to an account on the system
Logout		The "Logout" button can be used to log the user off the system.
Modify/Amend		Edit or amend a notice.
MPIN	n/a	Marketing Partner Identification Number. Export Controlled requires that the vendor's company be certified by the Defense Logistics Information Service Joint Certification Program to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's DUNS/MPiN.
Non-FBO Solicitation	n/a	Buyers can create links to sensitive, but unclassified, documents posted in the FBO system, for viewing outside the context of FBO notices. Non-FBO solicitations, when released in the system, support a "link" (URL) to the Non-FBO solicitation's sensitive, but unclassified, document packages. The Non-FBO "link" can be used in other systems, or documents, and when clicked by a vendor will "link" the vendor to the Non-FBO materials. The system controls vendor access (e.g., explicit access, export control) to the Non-FBO solicitation, in the same manner as it does for a FBO solicitation. Non-FBO links were previously managed through FedTeds.
Package		Collection of "documents" that can be attached to a "notice".



Paste Text		
Post		Finalizes a Notice and posts the notice on the system for vendor review.
Proceed		The "Proceed" button saves the entered data on a form and takes the user to the next step (first prompting users to complete required fields on the form).
Quicklink	n/a	A "quicklink" is a system navigational option that if selected takes a user to a specific action on the site.
Quit Process and Return		The "quit process and return" button returns the user to the previous page, without updating any record fields.
Register		Request a user account on the system.
Reject		The "Reject" button is used to reject a vendor's request for explicit access to sensitive, but unclassified documents.
Release Package		Finalizes a Package and releases for use by a buyer.
Required Field	*	A red asterisk next to a field label indicates that the field is a required.
Return		The "return" button returns the user to the navigation.
Review or view		"Review" opens an object for review.
Save		The "Save" button saves the entered data on the form. User will be required to complete all required fields on the form.
Save Draft		The "Save Draft" button saves the entered data in a draft document, (user is not required to complete required fields on the form).
Search Agent	n/a	Vendors can set up "search agents" based on selected detailed search elements. Search agents can be run on an ad hoc or scheduled basis to highlight newly filed opportunities which align with the designated search criteria.
Sensitive, but Unclassified Document	n/a	Vendors are required to logon to the system and to have a valid MPIN on file, to review sensitive, but unclassified documents. "Export Controlled" and "explicit access" are more stringent access controls that may also apply to sensitive, but unclassified documents.
Spell Check		Certain text entry fields offer spell check tool that is indicated by this icon.
Sub-tab	n/a	These are sections of a main navigation that a user can move to while in that main navigation (e.g, "my profile" is a main navigation, and "account" and "contact information" are sub-tabs in that main navigation).
Username	n/a	All users will have one "username". The username is used to log into the system.

Vendor	n/a	Provider of services.
Watch List		Designation that vendor can set on a notice that saves the notice on a sub-tab list of notices. The watch list is easily accessed with a quick link and the vendor

## 2 Logging onto the System

### 2.1 System URL

The URL for the system is <https://www.fbo.gov>. All system users navigate to this URL to logon to the system.

### 2.2 Navigation Bar on Logon Page – Unsecured features

The Navigation across the top of the login page allows users access to the following features prior to being logged onto the system:

- I. General Information
- II. News
- III. Opportunities (for all agency/all offices)
- IV. Agencies
- V. Privacy

The screenshot shows the top navigation bar of the FEDBIZOPPS.GOV website. The navigation bar includes the following items: Home, General Info, News, Opportunities, Agencies, and Privacy. Five yellow arrows labeled I through V point to these items respectively. The main content area features a welcome message, a 'Find Opportunities' button, and sections for Buyers/Engineers and Vendors. The 'Find Opportunities' section includes the text 'NO REGISTRATION REQUIRED' and 'Start researching now'. The 'Buyers / Engineers' section includes a 'View Opportunities' link and a 'Register Now' link. The 'Vendors' section includes a 'Find Opportunities' link and a 'Register Now' link. The right sidebar contains a 'QUICK SEARCH' box, 'USER GUIDES' (Buyer, Vendor, Engineer, Location / Agency Admin), and 'ADDITIONAL RESOURCES' (Business Partner Network (BPN), Central Contractor Registration (CCR), Online Reqs & Cert Application (ORCA), Federal Agency Business Forecasts, Federal Assets Sales).

## 2.3 Register for an Account

Note - Before an individual government user can register to use FBO, his or her Agency must be registered with FBO. Please contact the FBO Helpdesk for Agency Registration 877-472-3779.

- I. To get started, go to [fbo.gov](http://fbo.gov) and click on the Buyers / Engineers' "Register" link. This will open up a series of screens where the user enters registration data.

The screenshot shows the FBO.gov homepage. At the top, there is a navigation bar with links for Home, General Info, News, Opportunities, Agencies, and Privacy. Below this is a large banner area with a bald eagle on the left and a 'Find Opportunities' button on the right. The button text reads 'Find Opportunities NO REGISTRATION REQUIRED Start researching now ▶'. Below the banner, there are two main content areas: 'Buyers / Engineers' and 'Vendors'. Each area has a login form with fields for Username and Password, and a 'Login' button. Next to the login forms are links for 'View Opportunities', 'Register Now', and 'Password Reminder'. A yellow arrow points to the 'Register Now' link in the 'Buyers / Engineers' section. On the right side of the page, there are three sections: 'QUICK SEARCH' with a search box and 'Go' button; 'USER GUIDES' with links for Buyer, Vendor, Engineer, and Location / Agency Admin; and 'ADDITIONAL RESOURCES' with a list of various government programs and services.

- II. Step one – Personal Information is entered. Once required fields are entered, select “proceed”.

**FEDBIZOPPS.GOV** Federal Business Opportunities

Home General Info News Opportunities Agencies Privacy

Buyer/Engineer Registration

**1 Personal Information**

**2 Account Information**

**3 Review/Submit**

**FedBizOpps (FBO) Registration Form for Federal Users** \* indicates a required field

Before an individual user can register to use FBO, his or her Agency must be registered with FBO. Please contact the FBO Helpdesk for Agency Registration

**Your Full Name\*:**  
Please enter your full name.  
Example: John F. Smith

**Your Suffix:**  
If applicable, enter your suffix.

**The Title of Your Position:**  
Enter the title of the position you hold at your agency.

**Your Email Address\*:**  
Enter your email address.  
Example: john@agency.gov

Cancel Proceed

- I. Step two – Account Information is entered - Agency / Office is set up, along with password creation. When you enter a desired password, for security purposes, the password must meet the following criteria:
  - Must be between 8 and 14 characters
  - Must contain 1 of each of the following:
    - lower case letter
    - upper case letter
    - number
    - special character (e.g. !, %, ^)
- II. During account registration, location admin should request to be a “location administrator”. This allows users to manage buyers and engineer registrations for their location, and to create sensitive, but unclassified documents and to manage opportunities for their location.
- III. Once required fields are entered, select “proceed and review”.

## Buyer/Engineer Registration

1 Personal Information

2 Account Information


3 Review/Submit

 **On this step:** Please choose your agency/office location and choose an account password

### Account Information \* indicates a required field

**Agency\*:**

Choose your agency down to the lowest level

APPALACHIAN REGIONAL COMMISSION 

**User Role(s)\*:**

- **Buyers:** Create, Modify/Amend, or Cancel Opportunity Notices. They manage document package content, and vendor accessibility to package documents, that support opportunities. Buyers can upload non-sensitive docs (and attach existing sensitive, but unclassified docs to notices). Buyers can also create non-fbo solicitation links.
- **Engineers:** This user group can post / update sensitive, but unclassified packages for use as attachments to Opportunities.
- **Buyer/Engineer:** A single user can be given both Buyer and Engineer user rights. This allows a single user to both post secured, but unclassified packages and to create solicitations.
- **Office Location Administrators:** Users that authorize an office location's staff as either buyer / engineer. Office Location administrators are also able to post opportunities, and sensitive, but unclassified packages, for their location.

Buyer  Engineer  Office Location Administrator

**Username\*:**

Please choose your login username now

**Desired Password\*:**

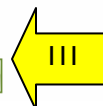
Enter the password you wish to use to gain access to the system.

For security purposes, the password must meet the following criteria:

1. Must be between 8 and 14 characters
2. Must contain **all of the following:**
  - 1 lower case letters
  - 1 upper case letters
  - 1 numbers
  - 1 special characters (e.g. !, %, ^)


**Repeat Desired Password\*:**

Repeat the password you entered in the previous field to verify it was entered correctly.



- I. Step three – Review/Submit - Registrant is asked to review registration information.
- II. Click “go back” to correct information on previous steps.
- III. If everything is correct, click “submit” at the bottom of the page.

- 1 Personal Information
- 2 Account Information
- 3 Review/Submit

 **On this step:** Please review your registration information. If everything is correct, click **Submit Registration** now. Otherwise, click **Go Back** to correct information on previous steps.

### FedBizOpps (FBO) Registration Form for Federal Users

Your Full Name:  
nancy

Your Suffix:  
n

The Title of Your Position:  
n

Your Email Address:  
[n@simplicity.com](mailto:n@simplicity.com)

#### Account Information

Agency:  
AGENCY FOR INTERNATIONAL DEVELOPMENT

**Note:** You have selected the top level of this agency hierarchy.

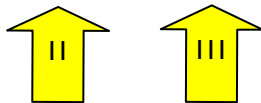
Contracting Office (Enter Manually):  
test

User Role(s):  
Engineer

Username:  
testeng

Desired Password:  
\*\*\*\*\*

Repeat Desired Password:  
\*\*\*\*\*



- I. The next screen explains that registrants will receive an e-mail after submitting a registration which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail



The screenshot displays the 'Buyer Registration' page on the FEDBIZOPPS.GOV website. The page features a navigation menu with 'Home', 'General Info', 'News', 'Opportunities', 'Agencies', and 'Privacy'. The main content area is titled 'Buyer Registration' and includes a progress indicator with three steps: 1. Personal Information, 2. Account Information, and 3. Review/Submit. The current step is 'Final Step: Email Verification', which includes an envelope icon and the following text: 'IMPORTANT: You should receive an email shortly. In order to complete the registration process, you must verify your email address and identity by following the email instructions. You may now return to [the FBO home page](#).' The footer contains links for 'Accessibility' and 'Help Desk', along with contact information: '877-472-3779 (Toll Free)' and 'fbo.support@gsa.gov'.

- II. Once the location admin has completed the steps outlined in the email, the registrant's accounts must now wait for administrator approval prior to being able to logon to the system.
- III. Once approved, newly registered location admins will be sent another e-mail. Once that approval is received, a new user may login to the system.



## 2.4 Returning Users – Log into the system

- I. Point your browser to <https://www.fbo.gov> and select Location Administrator “Login Here”.

The screenshot shows the FEDBIZOPPS.GOV website. The header includes the site name and logos for Federal Business Opportunities, IAE, E-GOV, and USA.gov. The navigation menu has tabs for Home, General Info, News, Opportunities, Agencies, and Privacy. The main content area features a welcome message and a 'Find Opportunities' button with the text 'NO REGISTRATION REQUIRED' and 'Start researching now'. Below this are sections for 'Buyers / Engineers' and 'Vendors', each with a login form. The 'Buyers / Engineers' section has a yellow arrow labeled 'II' pointing to its 'Login Here' link. The 'Location / Agency Administrators' section has a yellow arrow labeled 'I' pointing to its 'Login Here' link. A sidebar on the right contains a search box, user guides, and additional resources.

- II. Note, a location admin’s username and password will also work for the “buyers/engineers” interface logon. If logged in this manner, only buyer / engineer navigation will be available. Use the location / agency admin logon to manage agency / buyer data.

- I. That link takes the user to the "Administrator" interface for the system.
- II. On this screen, enter username and password to log into the system.
- III. Click "Go" to continue to logon.
- IV. The "Forgot My Password" option allows a user to request a password via email (user name must be known).
- V. To return to FBO home page (previous screen),
- VI. "Help Desk" opens a issue ticket with the FBO Support group.

The screenshot shows the 'Admin Login' page for the Federal Business Opportunities (FBO) system. The page header includes the 'FEDBIZ OPPS.GOV' logo and the text 'Federal Business Opportunities'. The date and time are 'Tuesday, April 15, 2008 | 3:09 pm'. The page has two tabs: 'Login' (selected) and 'Forgot My Password'. The login form contains the following elements:

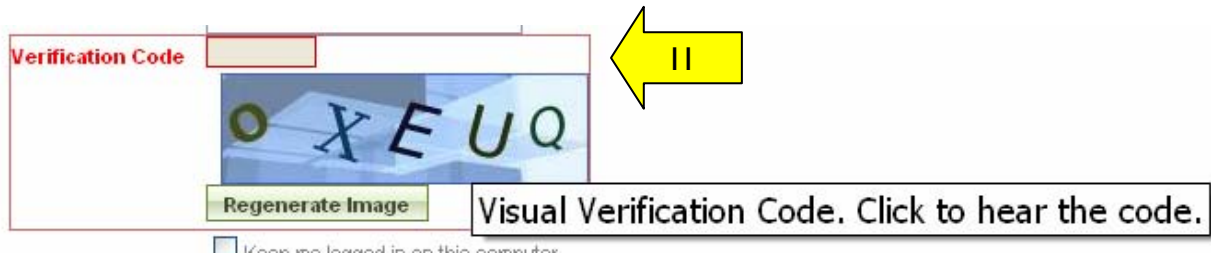
- Username: [text input field]
- Password: [password input field]
- Keep me logged in on this computer
- Go [button] Reset [button]
- Links: [FBO Home page](#) | [Help Desk](#)

Yellow arrows with Roman numerals are overlaid on the page to indicate specific actions:

- Arrow IV points to the 'Forgot My Password' tab.
- Arrow III points to the 'Go' button.
- Arrow VI points to the 'Help Desk' link.

## 2.4.1 Captcha Security

- I. Login Security – When a user (or machine) enters a username or password incorrectly three consecutive times, a captcha (image with characters) is displayed as a check to see if the user attempting to log in is indeed a human user.
- II. The user must enter the characters displayed in the “Verification Code” with their username and password in order to attempt another login. This prevents unauthorized access by spammers and other security threats. Users can click on the image to hear the code.



## 2.4.2 FBO Terms and Conditions

- I. All users are required to review and to agree to FBO Terms and Conditions which are presented after a user has entered correct username and password data.
- II. To agree to the terms and conditions, select "accept". If you do not consent to the conditions stated, select "decline." Decline logs the user off the system.

### FBO Terms and Conditions

LOG OFF IMMEDIATELY if you do not consent to the conditions stated in the following notice. Otherwise click "Accept" to accept the terms and proceed.

#### I. Usage Agreement

This is a Federal computer system and is the property of the United States Government. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy in anything viewed, created, downloaded, or stored on this system, including e-mail, Internet, and Intranet use. Any or all uses of this system (including all peripheral devices and output media) and all files on this system may be intercepted, monitored, read, captured, recorded, disclosed, copied, audited, and/or inspected by authorized Small Business Administration (SBA) personnel, the Office of Inspector General (OIG), and/or other law enforcement personnel, as well as authorized officials of other agencies. Access or use of this computer by any person, whether authorized or unauthorized, constitutes consent to such interception, monitoring, reading, capturing, recording, disclosure, copying, auditing, and/or inspection at the discretion of authorized SBA personnel, law enforcement personnel (including the OIG), and/or authorized officials of other agencies. Unauthorized use of this system is prohibited and may constitute a violation of 18 U.S.C. 1030 or other Federal laws and regulations and may result in criminal, civil, and/or administrative action. By continuing to use this system, you indicate your awareness of, and consent to, these terms and conditions and acknowledge that there is no reasonable expectation of privacy in the access or use of this computer system.

#### II. Privacy Act Routine Uses (5 USC § 522a as amended)

**Disclosure (or providing) of information requested in forms contained within this system or provided via email contact is "voluntary."** By providing the information, the individual assumes all responsibility to ensure the information provided is correct and valid and is so maintained.

- Vendor Information: Vendor-provided information, including email addresses and company information, will be used to establish user accounts for submitting subcontracting reports,

## 3 Location Admin's Secured Interface

### 3.1 "session time out"

Once a user is logged onto the system, the system will check to make sure the user is actively using the site. If a user is inactive for 60 minutes, the user will be automatically logged off the system. Activity in this sense is defined as data that has been submitted by the user. Some examples are the request for a navigational (e.g., selection of a quicklink) or if a user submits a form (e.g., selection of "save draft" during notice creation).

To ensure the user is aware of this pending circumstance, after 55 minutes of inactivity, a warning message appears that indicates the pending action. When the warning message appears, to remain logged onto the system, select "click keep me logged in". If the user does not make this selection, the session will be closed and any unsaved data will be lost. The system returns the user to the system logon screen (fbo.gov).

### 3.2 Main Navigation

Main Navigation for the Location Admin's Secured Interface appears down the left of the user's page. Using this navigation, users can move between the following key navigational elements: "Home," "Procurement Notices," "Document Links," "Agencies," and "My Account"

- I. The Arrow designation on "Agencies" navigation can be used to closed the sub-navigations, "Organizations," and "Buyers"

The screenshot displays the FEDBIZOPPS.GOV interface. At the top, the header includes the site name, navigation links for Federal Business Opportunities, and the current date and time (Thursday, April 24, 2008 | 5:26 pm). The user is identified as 'nancy agency - DELAWARE RIVER BASIN COMMISSION'. The main navigation menu on the left contains links for Home, Procurement Notices, Documents/Links, Agencies (highlighted with a yellow arrow), Organizations, Buyers, Electronic Accounts, and My Account. Below the navigation menu are links for User Guide and Help Desk. The main content area shows a 'Home' dashboard with sections for Pending Actions (Explicit Access Requests, Agency Contact Registrations), Quicklinks (Create Notice, Mod/Amend Notice, Create Award, Cancel Notice, Upload New Documents/Links), Statistics (Active Procurement Notices, Archived Procurement Notices, Active Non-FBO Solicitations, Archived Non-FBO Solicitations, Active Document Packages, Agency Users), and Account Switcher (Switch office/agency account: DELAWARE RIVER BASIN COMMISSION). There are also announcements at the bottom.

### 3.2.1 Home

The “Home” page allows for easy access to the following system features:

- I. “quicklinks” – Navigational options that if selected take a user to a specific action on the site (e.g., “Create Notice”).
- II. “Announcements” – System Announcements posted for the user’s reference.
- III. “Pending Actions” – Tally of the pending actions, (e.g, number of explicit access requests in need of processing).
- IV. “Statistics” – Tally of the Active and Archived Notices on the site.

The screenshot shows the FEDBIZOPPS.GOV Home page. The page header includes the site logo, the text "Federal Business Opportunities", and the date/time "Wednesday, April 16, 2008 | 6:54 pm | User: nancy agency - Sample Agency in FBO Test | Logout". The page is divided into several sections:

- Pending Actions:** Contains two items: "0 Explicit Access Requests" and "0 Agency Contact Registrations". A yellow arrow labeled "III" points to this section.
- Quicklinks:** Contains six items: "Create Notice", "Mod/Amend Notice", "Create Award", "Cancel Notice", and "Upload New Documents/Links". A yellow arrow labeled "I" points to this section.
- Statistics:** Contains six items: "2 Active Procurement Notices", "0 Archived Procurement Notices", "0 Active Non-FBO Solicitations", "0 Archived Non-FBO Solicitations", "1 Active Document Packages", and "6 Agency Users". A yellow arrow labeled "IV" points to this section.
- Account Switcher:** A section with a "NEW" badge, stating "Your username is tied to more than one account. Jump to a different office/agency account instantly by changing the selection below." It includes a dropdown menu currently set to "Sample Agency in FBO Test" and a tip: "Tip: click the icon at the top of the page to switch accounts at any time."
- Announcements:** Contains the text "There are no announcements at this time." A yellow arrow labeled "II" points to this section.

A left-hand navigation menu includes links for Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk.

### 3.2.2 Multi-account Users

- I. Because some location admins are associated with multiple agencies/offices, they will have multiple accounts tied to their username. Users having multiple associations can switch between accounts by using the “switch account” tool on their home page. A smaller switch account option also appears on the top of all pages of navigation.
- II. If the username is not associated with multiple accounts, these links will not be available.
- III. When a user logs in, they will see “user name” / “agency” of the account they are currently managing.

The screenshot displays the home page of the FEDBIZOPPS.GOV system. The top navigation bar includes the site logo, the text 'Federal Business Opportunities', and the user's current session information: 'Thursday, April 24, 2008 | 5:26 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION'. A yellow arrow labeled 'III' points to this user information.

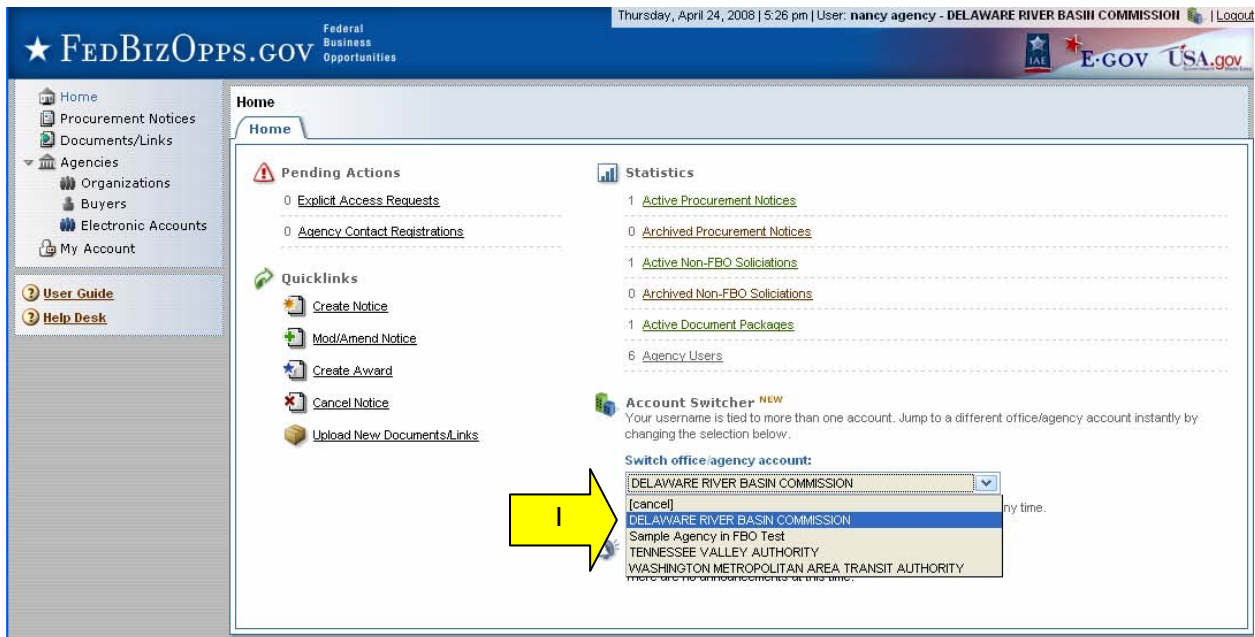
The main content area is titled 'Home' and contains several sections:

- Pending Actions:** Lists 'Explicit Access Requests' (0) and 'Agency Contact Registrations' (0).
- Quicklinks:** Includes 'Create Notice', 'Mod/Amend Notice', 'Create Award', 'Cancel Notice', and 'Upload New Documents/Links'.
- Statistics:** Shows counts for 'Active Procurement Notices' (1), 'Archived Procurement Notices' (0), 'Active Non-FBO Solicitations' (1), 'Archived Non-FBO Solicitations' (0), 'Active Document Packages' (1), and 'Agency Users' (6).
- Account Switcher:** A section with a 'NEW' badge. It states: 'Your username is tied to more than one account. Jump to a different office/agency account instantly by changing the selection below.' Below this is a dropdown menu labeled 'Switch office/agency account:' with 'DELAWARE RIVER BASIN COMMISSION' selected. A yellow arrow labeled 'I' points to this dropdown. A tip below reads: 'Tip: click the [person icon] icon at the top of the page to switch accounts at any time.'
- Announcements:** States 'There are no announcements at this time.'

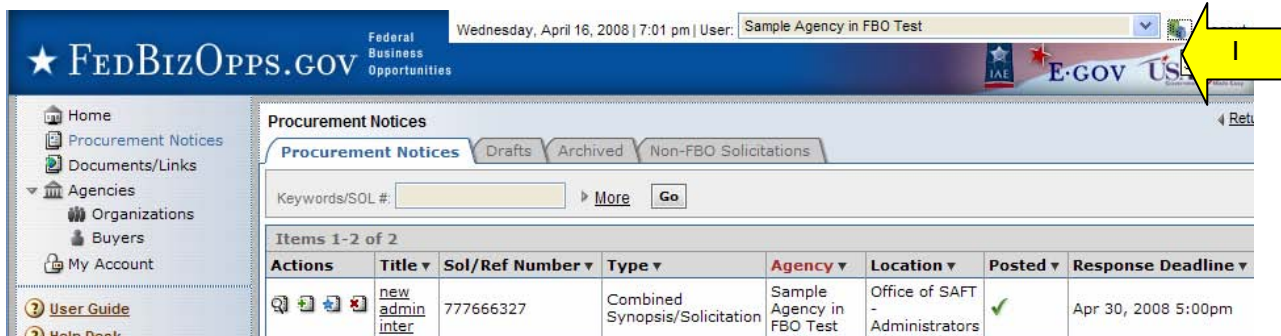
The left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies (Organizations, Buyers, Electronic Accounts), and My Account. Below these are 'User Guide' and 'Help Desk' links.

- I. If "switch account" link is clicked, the user will have the option to select another account.

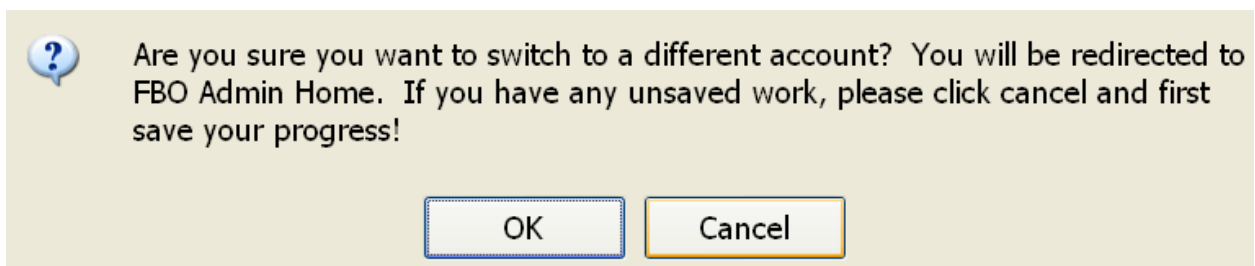
Home Page Option to switch account:



Option to switch shows on top of page of other pages in the site:



- II When a user is about to change accounts, the system will present the following warning. If a user switches accounts without saving work, they will lose those edits.





### 3.2.3 Procurement Notices

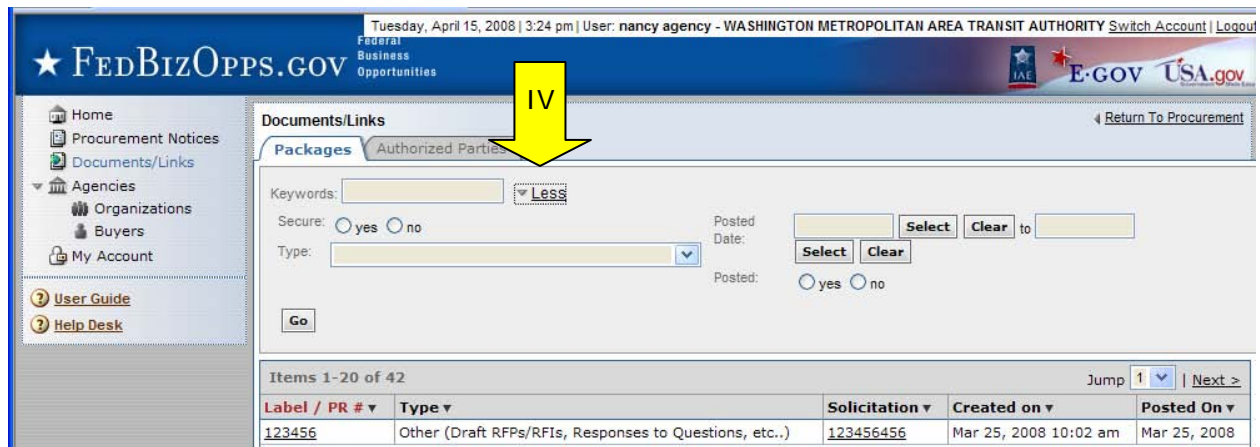
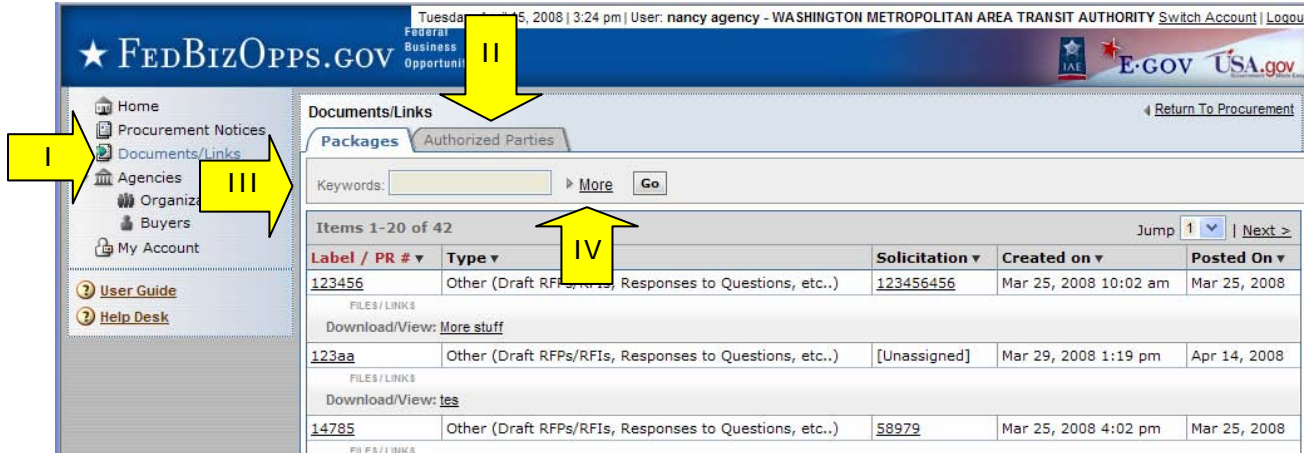
- I. There are four sub-tabs on the "Procurement Notices" page. "Procurement Notices" lists all "Posted" (viewable on vendor interface).
- II. The "draft" sub-tab lists draft notices (not viewable on vendor interface).
- III. The Archived sub-tab presents a list of archived notices.
- IV. Non-FBO Solicitations lists links to documents posted in FBO for viewing outside the context of FBO notices. Note, these sorts of links were previously managed through FedTeds.

The screenshot shows the FEDBizOPPS.gov interface. At the top, there is a navigation bar with the site logo and user information. Below this is a sidebar with navigation links like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The main content area is titled "Procurement Notices" and features four sub-tabs: "Procurement Notices", "Drafts", "Archived", and "Non-FBO Solicitations". Four yellow arrows labeled I, II, III, and IV point to these tabs. Below the tabs is a search and filter section with fields for Keywords/SOL #, Type (with checkboxes for Presolicitation, Combined Synopsis/Solicitation, Sources Sought, Modification/Amendment/Cancel, Sale of Surplus Property, Foreign Government Standard, Award Notice, and Special Notice), and Date Posted. Below the search section is a table of items. The table has columns for Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. The first row shows a notice with a title starting "2nd explicit access make sure not universal status for all", a Sol/Ref Number of "estateate", a Type of "Combined Synopsis/Solicitation", an Agency of "test section", a Location of "5", a green checkmark in the Posted column, and a Modified date of "Apr 1 2008 9:28".

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modi
	2nd explicit access make sure not universal status for all	estateate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 1 2008 9:28

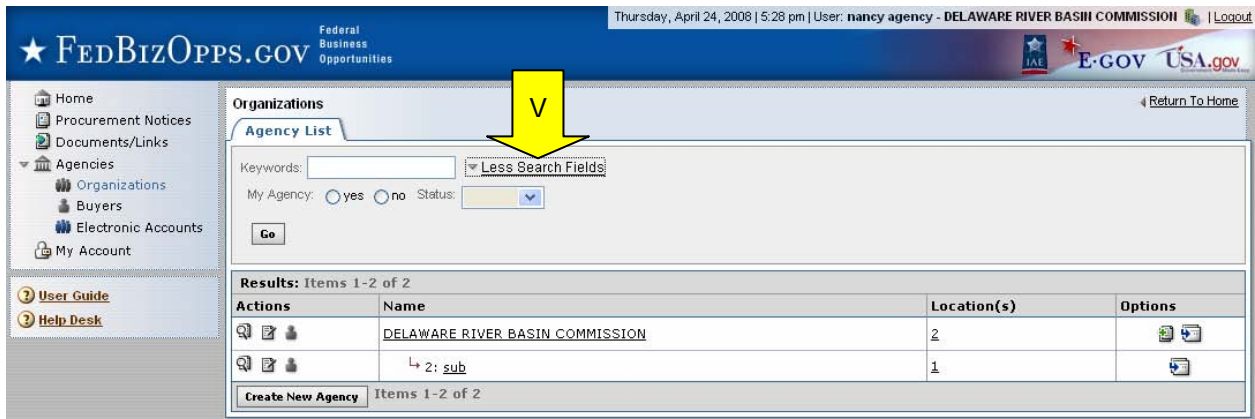
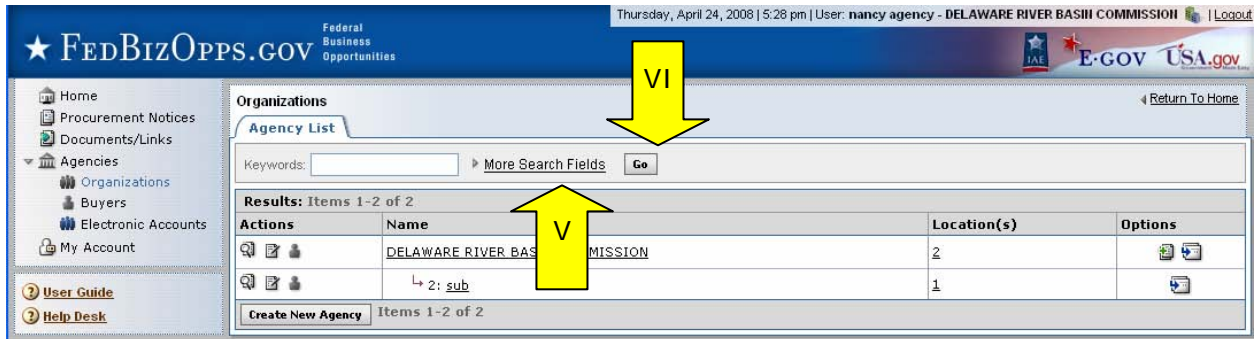
### 3.2.4 Document / Links

- I. There are two sub-tabs on the user's "Documents/Links" page. The "packages" sub-tab presents the list of active document packages associated with their agency/office notice.
- II. The "authorized parties" tab has three sub tabs which enumerate, "authorized" vendors, "pending request" for authorization, and "rejected requests" for authorization.
- III. The keyword search allows a user to conduct a full word search of the document title.
- IV. "more" opens up additional search filters ('less" closes the added search filters).



### 3.2.5 Agencies

- I. There are three sub-tabs on the user's "Agencies" navigation.
- II. The "Organizations" sub-tab presents the list of organizations in the agency
- III. The "Buyers" sub-tab presents a list of buyers for that agency.
- IV. The "Electronic Accounts" list users in the agency that are only able to submit notices via ftp/email accounts.
- V. Search filters are available to help find agencies or buyers in the respective list. Use More/Less to add additional search filters.
- VI. Use "Go" to submit a search.



### 3.2.6 My Account

- I. There are two sub-tabs on the users "My Account" page (which are tied to an account profile). On these sub-tabs the user is able to update "contact information" and "account" data.
- II. Agency, Office and Role information is show on the right section of this page. Note, the information reflected here determines which opportunities a location admin is able to manage on their account's secured interface. Location Admins will manage opportunities, packages and users that are aligned with their agency/location branch of the organization.
- III. From the "contact information" tab, select the "edit" to changes contact fields.

Tuesday, April 15, 2008 | 3:35 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | [Switch Account](#) | [Logout](#)

**FEDBIZOPPS.GOV** Federal Business Opportunities | [E-GOV USA.gov](#)

**nancy agency: Contact Info** [Return To Agency](#)

**Contact Information** Account

[Edit](#) [Return](#)

**Agency User Information**

Fullname: nancy agency  
 First Name: nancy  
 Last Name: agency  
 Email: [test-3@svmplicity.com](mailto:test-3@svmplicity.com)

[Edit](#) [Return](#)

**Agency Information**

Agency	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
Office	Top Level
Role (s):	Agencyadmin

I. Enter field changes as desired. Select "save" to save updates to the form.

Tuesday, April 15, 2008 | 3:36 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

Federal Business Opportunities

**FEDBIZOPPS.GOV**

Home | Procurement Notices | Documents/Links | Agencies | Organizations | Buyers | My Account

[User Guide](#) | [Help Desk](#)

**nancy agency: Contact Info** [Return](#)

Contact Information Account

[Save](#) [Delete](#) [Return](#) \* indicates a required field

### Agency User Information

Edit your personal information

Title:

Fullname\*:

First Name:

Middle Name:

Last Name:

Suffix:

Email\*:


Phone:

Cell Phone:

Fax:

[Save](#) [Delete](#) [Return](#)

Agency Information	
Agency	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
Office	Top Level
Role (s):	Agencyadmin



- I. From the "account" tab, users can change their username or password.
- II. Select "save" to save updates to the form.

The screenshot shows the 'nancy agency: Account' page on the FEDBIZOPPS.GOV website. The page is titled 'nancy agency: Account' and has a 'Return' link. Below the title are two tabs: 'Contact Information' and 'Account'. A yellow arrow labeled 'I' points to the 'Account' tab. The 'Account' tab contains a 'Save' button and a form titled 'Account Information'. The form has three fields: 'Username\*' (with the value 'nancyagency'), 'Enter New Password:', and 'Verify Password:'. A yellow arrow labeled 'II' points to the 'Save' button at the bottom of the form. A note at the top right of the form states '\* indicates a required field'. The page header includes the date 'Tuesday, April 15, 2008 | 3:36 pm' and the user 'User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The left sidebar contains navigation links for Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk.

## 4 Manage FBO Notices

### 4.1 Create Notice

- I. From any page on the system, a user can go to main navigation "Procurement Notices." This takes the user to the "notices" list.
- II. From the list, use the "Add New" button, located at the bottom of the page, to initiate a new notice. To create a notice, the user will walk through a stepwise process.

The screenshot shows the FEDBIZOPPS.GOV interface. The top navigation bar includes the site logo, user information (Thursday, April 17, 2008 | 12:35 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and a Logout link. The left sidebar contains a navigation menu with items like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled 'Procurement Notices' and features tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Below the tabs is a search bar with 'Keywords/SOL #' and 'ph' entered, and buttons for 'More', 'Go', and 'Clear'. A table displays two items:

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	<a href="#">test solicitation</a>	alphasolnum	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 16, 2008 4:00 pm
RELATED MODIFICATIONS / AWARDS:								
Name: <a href="#">Modification 1</a> Posted: Apr 16, 2008								
	<a href="#">Telephones</a>	123456789	Presolicitation	test section	5	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm
RELATED MODIFICATIONS / AWARDS:								
Name: <a href="#">Draft Modification</a> Posted: ✗								
Name: <a href="#">Draft Modification</a> Posted: ✗								

At the bottom of the table, there is an 'Add New' button and a status indicator 'Items 1-2 of 2'.

- III. Alternatively, a user can use the quicklink "Create Notice" on their home page to initiate a new notice.

### 4.1.1 Step 1 – NOTICE TYPE

The first step establishes the following fields for the Notice:

- I. Agency/Office – will be preset to a particular user’s agency if that user is only affiliated with one agency.
- II. Contracting Office Location– may be preset to a particular user’s agency if that user is only affiliated with one location.
- III. Type
- IV. Solicitation Number
- V. Note data entered in step 1 cannot be edited later. Care should be taken to ensure accuracy of data entered.
- VI. Select “proceed” to move forward to step two.

The screenshot shows the 'Create New Notice' form on the FEDBIZOPPS.GOV website. The page header includes the site logo, navigation links, and user information: 'Wednesday, April 16, 2008 | 7:05 pm | User: nancy agency - Sample Agency in FBO Test | Logout'. The left sidebar contains navigation options like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled 'Create New Notice' and '1 Notice Type'. It contains the following fields:

- Agency/Office\*:** A dropdown menu with 'Sample Agency in FBO Test' selected. Below it, a note says 'You may choose an agency from your level and below'.
- Contracting Office Location\*:** A dropdown menu with 'Office of SAFT - Administrators' selected. Below it, a note says 'You are not registered at the office location level. Please select the related office location'.
- Type\*:** A dropdown menu with 'Presolicitation' selected.
- Solicitation Number\*:** A text input field. Below it, a note says 'Agency assigned number for control, tracking, and identification. Please use ONLY alphanumeric and - \_ ( ) characters [no spaces]'.

At the bottom of the form are two buttons: 'Quit Process And Return' and 'Proceed'. A yellow arrow points to the 'Proceed' button.



## 4.1.2 Step 2 – NOTICE Details

- I. The second step establishes the following fields for the Notice (asterisks indicates required form field):
  - a. Title\* - description of services, supplies, or project required. NOTE: 256 character limit.
  - b. Classification Code\* -
  - c. NAICS Code\*
  - d. Response Date\*
  - e. Primary Point of Contact\*
  - f. Secondary Point of Contact
  - g. Description\*
  - h. Place of Contact Performance
  - i. Set Aside
  - j. Archiving Policy\* (note - notices archive the morning of this date).
  - k. Allow Vendors to Add/Remove From Interested Vendors\*
  - l. Allow Vendors to View Interested Vendors List\*

Wednesday, April 16, 2008 | 7:06 pm | User: nancy agency - Sample Agency in FBO Test | Logout

FEDBIZOPPS.GOV Federal Business Opportunities

Home  
Procurement Notices  
Documents/Links  
Agencies  
Organizations  
Buyers  
My Account  
User Guide  
Help Desk

Create New Notice

1 Notice Type  
2 **Notice Details**  
3 Attachments  
4 Review/Submit

**Notice Details** \* indicates a required field

Enter notice information below. Click **proceed** to review your information once complete or **save draft** to save your progress so you can finish and post later.

Solicitation #:	Procurement Type:	Date Posted:
asdfad	Presolicitation	April 16, 2008

Title\*:  
Brief title description of services, supplies, or project required by the posting agency. Note: 256 character limit.

Classification Code\*:  
Service or supply code number. Each synopsis shall classify the contemplated contract action under the one classified code which most closely describes the acquisition. If the action is for a multiplicity of goods and/or services, the preparer should select the one category best describing the overall acquisition based upon value.

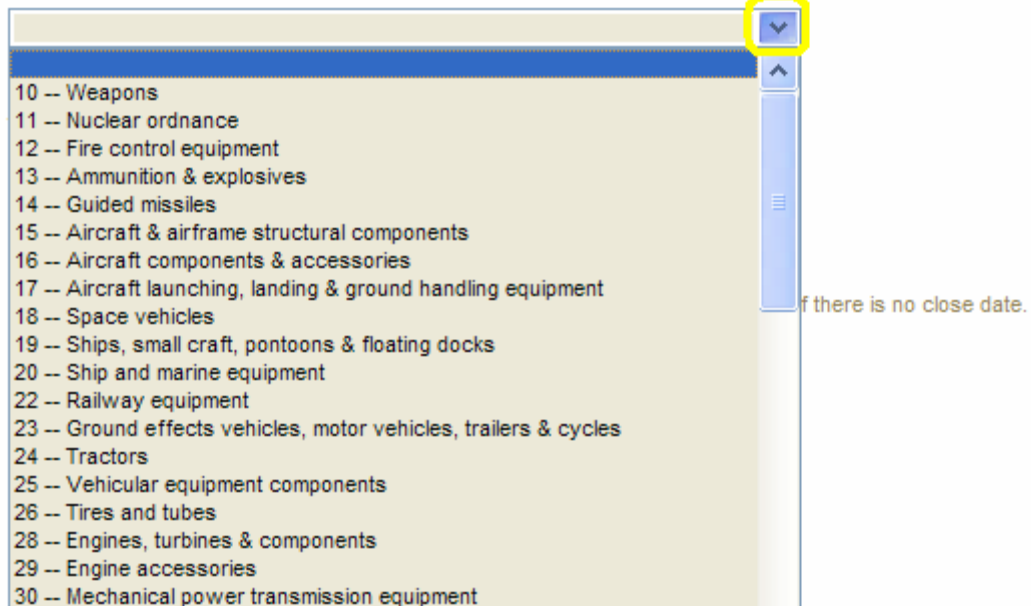
NAICS Code\*:  
Type the NAICS code to search for NAICS codes

- I. Note, because of the length of the form, not all fields are shown in the manual screen shots. Buyers should enter data requested in sequence as they scroll down the form. Fields will potentially appear conditionally as data is entered (e.g., if archiving policy is set to "automatic, on specified date" the buyer will be asked to enter the archive date).
- II. Some browsers may not display the form fields in the same way presented in this guide. The fields are structured to allow for a broad spectrum of browsers, and will be presented in the most robust manner for a user's system configuration. Internet Explorer users should upgrade to version 6.0 or higher, and Firefox users should operate on version 2.0 or higher, for optimal capabilities.

- I. For both Classification Code and NAICS Code fields, the system offers some features to help users more quickly navigate to their target values in the code lists.
- II. For the Classification Code field, use the arrow key field to open a complete listing. Highlight the target code and hit enter.

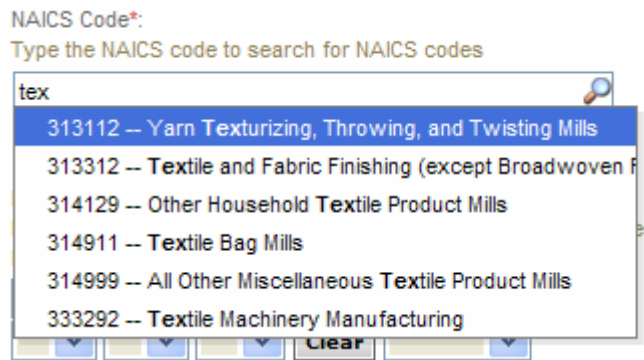
**Classification Code\*:**

Service or supply code number. Each synopsis shall classify the contemplated contract action under the one classified code which most closely describes the acquisition. If the action is for a multiplicity of goods and/or services, the preparer should select the one category best describing the overall acquisition based upon value.

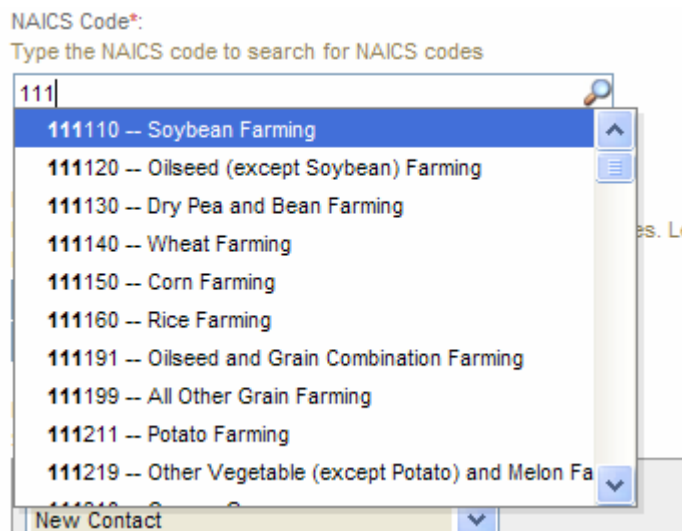


- III. Alternatively a user can type the code (e.g, "10" or "R") of the target value to navigate to the target selection and hit enter.

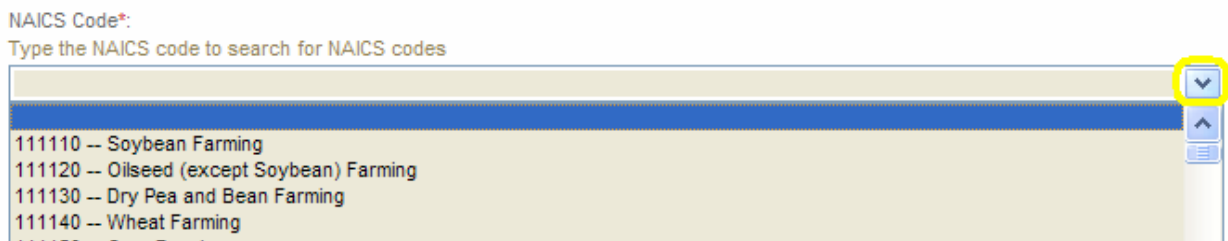
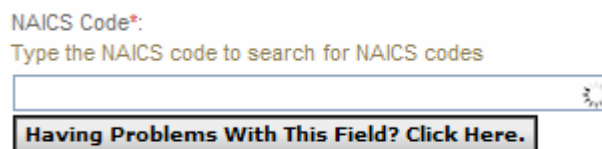
- I. For the NAICS Code field, place the cursor on the field and start to type the code / or the text for the code. If you start to type part of a word found in a code, e.g., "tex", the system will start to display terms with that term in the code.



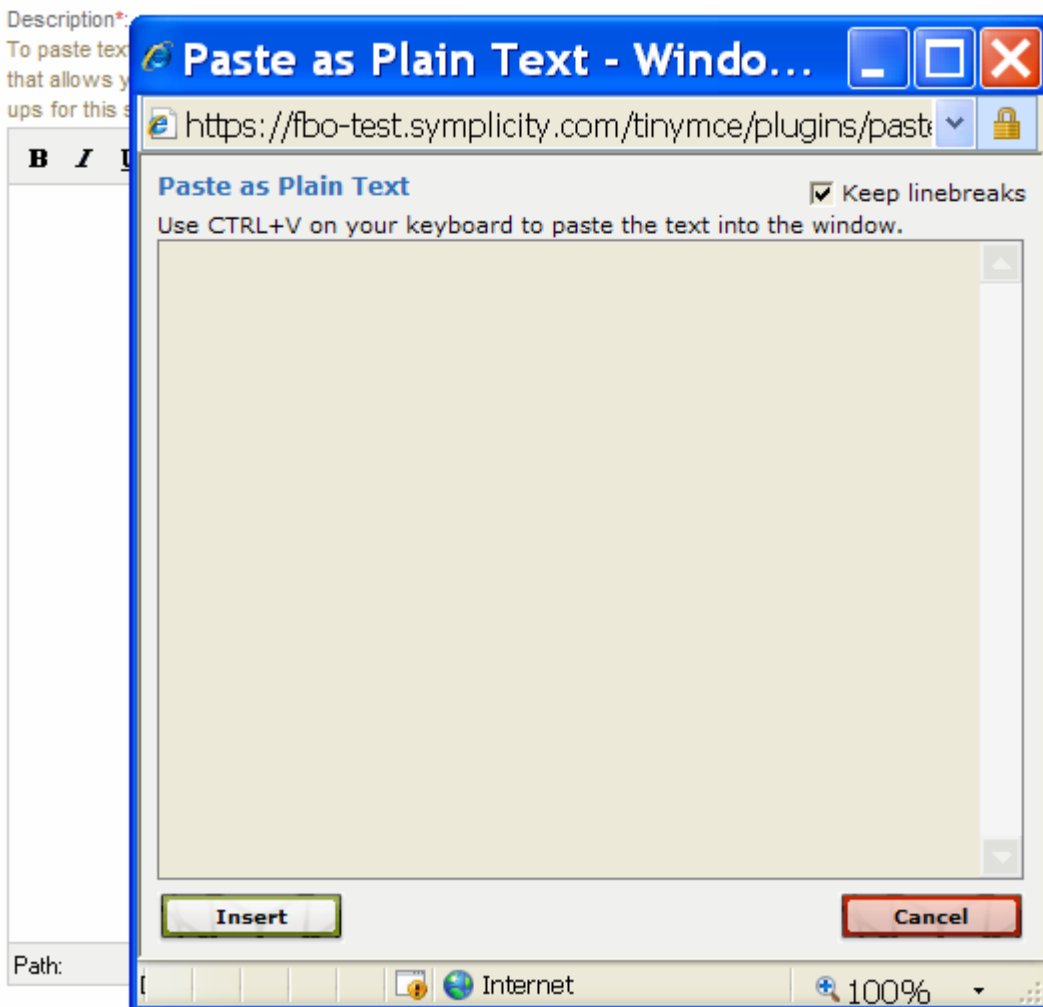
- II. If you start to type the numeric code, the system will present codes containing that string of values.



- III. Click the "having problems with this field, click here" button to have the system display a complete listing of NAICS codes which can be used for selection. Use the arrow key field to open a complete listing. Highlight the target code and hit enter.



- I. When creating a notice, if you are having trouble cutting and pasting text to the description text box, click the icon with the letter T on the icon , or press the "control" and the "v" keys. Doing either will open a pop-up window that allows you to paste in plain text to the field. Note, it may take a few seconds for the pop-up window to open. Unless you use the icon, pop-up blocking will need to be disabled for this site.
- II. Once the pop-up window is open, paste the text in the pop-up box and click "insert" ("cancel" aborts the process.) Text is converted to plain text and inserted at the top of the text field box. Note, insertion does not overwrite existing text in the field. Use the alignment, bold, italicize, and underline tools to add formatting to the plain text being inserted.
- III. Note, IE 6 users, will be able to cut and paste, but will not have html editor or the icon.



There are four options at the bottom of the form which the user can use on this form.

- I. The first is "Go Back". Use of this button takes the user back to step one.
- II. As the user is creating the notice, they may use the "Save Draft" option to save data entered for later edits/review. Notices saved in draft format will show with a red x for posted date on the notices list and they will only have the "review" action available.

Image of Notice list, displaying "draft" notice:

Thursday, April 17, 2008 | 12:36 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

FEDBIZOPPS.GOV Federal Business Opportunities

Home Procurement Notices Documents/Links Agencies Organizations Buyers My Account User Guide Help Desk

Procurement Notices Drafts Archived Non-FBO Solicitations

Keywords/SOL #  More Go

Items 1-20 of 31 Jump 1 | Next >

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	<a href="#">417buversol</a>	78979a8sd7f	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 17, 2008 11:33 am
RELATED MODIFICATIONS / AWARD S: Name: <a href="#">Modification 1</a> Posted: Apr 17, 2008								
	<a href="#">test solicitation</a>	alphasolnum	Combined Synopsis/Solicitation	test section	2nd office	✗	-	Apr 16, 2008 4:00 pm
RELATED MODIFICATIONS / AWARD S: Name: <a href="#">Modification 1</a> Posted: Apr 16, 2008								
	<a href="#">test replication</a>	aabb	Presolicitation	test section	5	✗	-	Apr 17, 2008 9:58 am
	<a href="#">added export after original explicit added</a>	testexpexport	Award Notice	test section	5	✓	-	Apr 15, 2008 7:13 pm
RELATED MODIFICATIONS / AWARD S: Name: <a href="#">Award</a> Posted: Mar 23, 2008 Name: <a href="#">Modification 3</a> Posted: Mar 23, 2008								

- III. "Quit Process and Return" if used when the notice was not previously saved as a draft, means that the solicitation will not be saved (will not appear on the notice list).
- IV. "Proceed" – takes the user to step three in the process.



### 4.1.3 Step 3 – Attachments

- I. The third step allows the user to attach documents or packages to the notice. A Package is simply a collection of Documents bundled together for review.
- II. During Step 3, if you save the notice as a draft, you can edit the attachment(s) again before posting. When you upload a file during this step, it saves the document as a fixed attachment. Users cannot ever edit attached files per se. Users can “delete” an attached document or “remove Package” and upload a new one if the notice is still in draft status.
- III. If a user does not wish to attach any documents/packages, they may use “proceed” button to move to the next step without attaching any documents.
- IV. Click “Add New Package” to upload documents to the notice. Users can either submit materials themselves, or attach secured documents (or both).

Wednesday, April 16, 2008 | 7:08 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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Base Notice: test - test33

1 Notice Type  
2 Notice Details  
3 Attachments  
4 Review/Submit

**Attachments** \* indicates a required field  
Click Add New Package below to upload documents to this notice.  
You may proceed and review without attaching documents.

Add New Package

Go Back Save Draft Quit Process And Return  
Proceed

## Sensitive, but Unclassified, Attachments

NOTE: If export control, or explicit access, are required on any of the solicitation's sensitive, but unclassified packages, then all sensitive, but unclassified packages attached to that solicitation will take on those requirements. So for instance if "attachment A" is export controlled and "attachment B" is explicit access, the solicitation as a whole will require that both explicit access and export control requirements are satisfied by the vendor before either package can be reviewed.

- I. When a user is adding a new package, the first step is to indicate whether the attachment is a sensitive, but unclassified/secure package.
- II. If "no," see below "Non-Sensitive Attachments".

Business Opportunities

notice: testnotice415 - newnotice415

### Attachments

\* indicates a required field

Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

**Add New Package**

**Go Back** **Save Draft** **Quit Process And Return** **Proceed**

- I. If attaching sensitive, but unclassified, the user is given the option to enter a new package or to select an existing (enter the PR# and use the "find package" button).

Notice: testnotice415 - newnotice415

### Attachments

*\* indicates a required field*

Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents.

**Package #1**

Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

Enter PR# To Search Existing:

Use "find package" to find that pr on the system if it already exists



- I. If adding new, a form will present that allows the user to set up the package. Users can either create a new package or select an existing package.
- II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

## Attachments \* indicates a required field

Click **Add New Package** below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

PR #\*:

Label\*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled?\*

yes  no

Explicit Access\*:

yes  no

Is CD Available\*:

yes  no

---

**File / Link #1**

File\*:

For files over 10 Mb, please use the Large Upload button. It requires Java to be installed on your system, and your browser needs to allow popups from this site.

If Uploaded File is compressed (.zip), check here to unzip after

- I. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.
- II. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.
- III. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

is this Export Controlled? :

yes  no


Explicit Access\*:

yes  no

Is CD Available\*:

yes  no

---

 **File / Link #1**

File\*:

For files over 10 Mb, please use the Large Upload button. It requires Java to be installed on your system, and your browser needs to allow popups from this site.

If Uploaded File is compressed (.zip), check here to unzip after uploading

Description\*:

Enter in a short description for this file/link

---

---



## Non-Sensitive Attachments

- I. If the user is attaching a document that is not sensitive, they should mark Is this package sensitive/secure? "no".
- II. Next, users are prompted to enter the "package type" (available package type options will align with the notice type).
- III. On the file "Type" field, the user indicates whether or not the material to upload is either a file or a "link"
- IV. If "upload" is chosen, the user is asked to specify the filename (note, user can use "browse" option to find the file) and to specify if the file is compressed (in .zip format). If "link" is chosen, the user is asked to specify the URL. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.
- V. Users are required to enter a description of the package.
- VI. After the document has been added, the user can add another document to this package or add another entirely new package.
- VII. "Go Back" button (bottom of form) takes the user back to step two in the process.
- VIII. "Save Draft" saves the materials to the draft notice.
- IX. "Quit Process and Return" does not attach the materials.
- X. "Proceed" takes the user to the next step in notice creation process.

Tuesday, April 15, 2008 | 6:24 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

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E-GOV USA.gov

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Base Notice: draft print - testtttt

### Attachments

\* indicates a required field  
Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Package Type\*:

Mod/Amendment cannot be selected for base notices.

Solicitation  
 Mod/Amendment  
 Other (Draft RFPs/RFs, Responses to Questions, etc.)

**File / Link #1**

Type\*:  
Choose "upload" to select a file from your computer or choose "link" to enter in website URL

upload  link

Description\*:  
Enter in a short description for this file/link

X

#### 4.1.4 Step 4 – Review / Submit

- I. The fourth step allows the user to review the notice and attachments and to submit the notice.
- II. The “go back” button takes user back in reverse order of the previous steps (3, 2, 1) and allows the user to edit data entered in earlier steps.
- III. “Save Draft” saves the materials to the draft notice.
- IV. “Quit Process And Return” returns the user to the previous navigation
- V. “Delete” allows the user to delete the draft package (save draft must have been used previously to see this option).
- VI. “Print” allows user to open the notice in a printer friendly format. See page for more details. See page 74 for more details.
- VII. “Post” moves the notice for review by users.

Wednesday, April 16, 2008 | 7:14 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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Base Notice: test - test33

- 1 Notice Type
- 2 Notice Details
- 3 Attachments
- 4 Review/Submit

**On this step:**  
Please review your notice information. If satisfied, click **post** to finalize your notice. You may click **save draft** to save your work for a later time, or can click **go back** to modify the information.

Go Back Save Draft Quit Process And Return  
Delete Print Post

Notice Details

Solicitation #: test33 Procurement Type: Combined Synopsis/Solicitation

Date Posted: April 16, 2008

Title: test


Classification Code: 17 -- Aircraft launching, landing & ground handling equipment

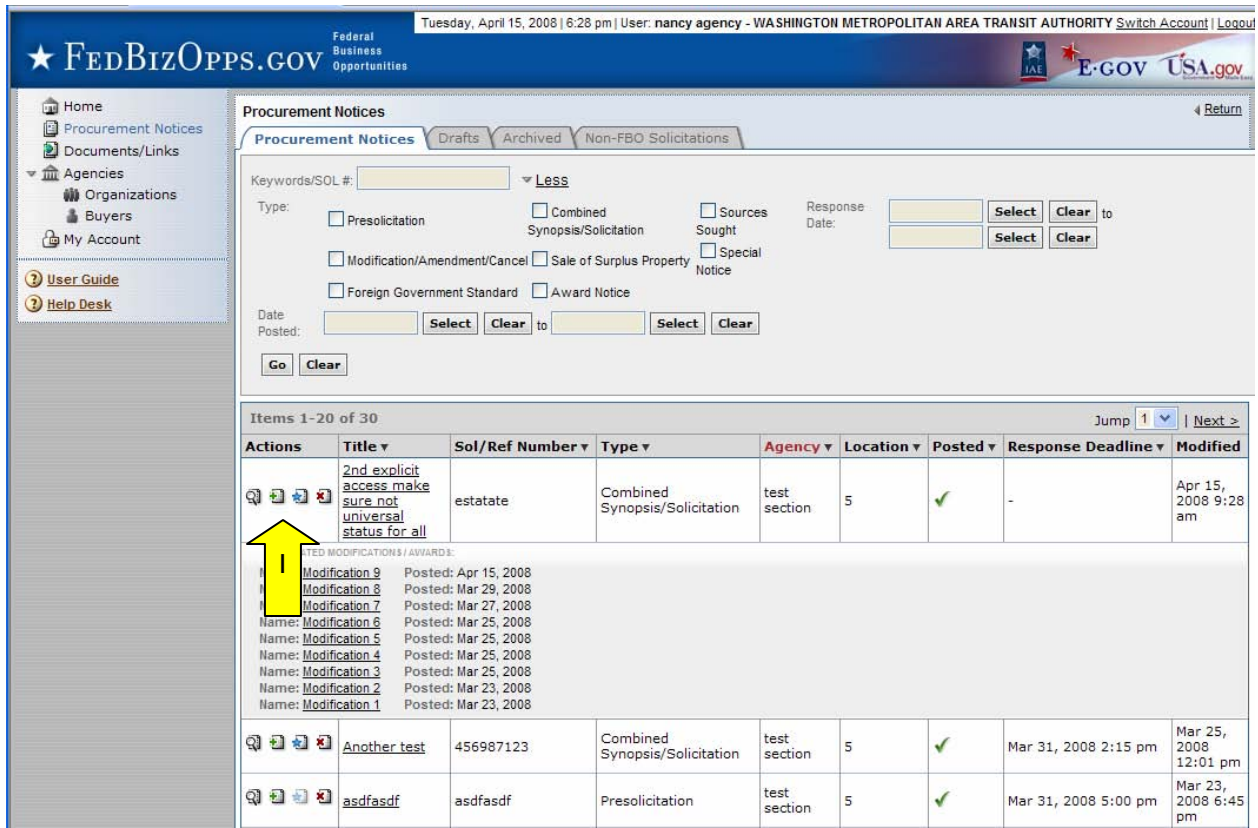
NAICS Code: 111130 -- Dry Pea and Bean Farming

Response Date: Mar 31, 2008 5:00 pm

Primary Point of Contact:

## 4.2 Modify/Amend Notice

- I. From any page on the system, a user can go to upper navigation "Notices" button and then use the modify/amend option to make edits to the notice. Look for: 
- II. Additionally, a user can use the quicklink "Mod/Amend Notice" on their "My FBO" page to modify / amend a notice.












Tuesday, April 15, 2008 | 6:28 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)  
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**Procurement Notices** [Return](#)  
 Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords/SOL #:  [Less](#)  
 Type:  Presolicitation  Combined Synopsis/Solicitation  Sources Sought  Special Notice  
 Modification/Amendment/Cancel  Sale of Surplus Property  Award Notice  
 Date Posted:  [Select](#) [Clear](#) to  [Select](#) [Clear](#)  
[Go](#) [Clear](#)

Items 1-20 of 30 [Jump 1](#) | [Next >](#)

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
  	<a href="#">2nd explicit access make sure not universal status for all</a>	estatate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am
LISTED MODIFICATIONS / AWARDS: Name: <a href="#">Modification 9</a> Posted: Apr 15, 2008 Name: <a href="#">Modification 8</a> Posted: Mar 29, 2008 Name: <a href="#">Modification 7</a> Posted: Mar 27, 2008 Name: <a href="#">Modification 6</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 5</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 4</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 3</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 2</a> Posted: Mar 23, 2008 Name: <a href="#">Modification 1</a> Posted: Mar 23, 2008								
  	<a href="#">Another test</a>	456987123	Combined Synopsis/Solicitation	test section	5	✓	Mar 31, 2008 2:15 pm	Mar 25, 2008 12:01 pm
  	<a href="#">asdfasdf</a>	asdfasdf	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:45 pm

- I. During the “modification type” step in the modify/amend process, the user indicates which step they would like to start with as they move forward:
  - a. add to or edit the description
  - b. attach files to the notice
- II. The system will then present the appropriate steps to allow the user to make the requested modifications/amendments.
- III. If making edits to notice details, they will be taken to “notice details” step.
- IV. If only attaching files, the user is taken directly to attachments.

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New Modification for 2nd explicit access make sure not universal status for all - estateate

Modification Details \* indicates a required field

Where do you want to start the modification process\*:

Notice Details, add/edit description

Attachments, attach Files

[Go Back](#) [Quit Process And Return](#) [Proceed](#)

I. If the user indicates that they would like to add/edit the description, the system will prompt the user to specify whether the existing description should be modified or if the user would like to append a new text field to the notice that would be highlighted as newly added material (highlighted in a vendor's review).

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New Modification for 2nd explicit access make sure not universal status for all - estate


### Modification Details \* indicates a required field

Where do you want to start the modification process\*:

Notice Details, add/edit description  
 Attachments, attach Files

Do you want to change the existing description or simply add to it?\*

Edit Existing Description  
 Add To Description



- I. If editing the existing description, the user will be able to edit the existing description and other notice detail fields.

### Notice Details

*\* indicates a required field*

You may update notice information below. Note that many fields are locked and cannot be changed from the base notice. When are you satisfied with your changes, you can click **save draft** to save this Modification/Amendment for later. Otherwise, click **proceed** to review your information

- II. If adding new text field to the notice, a new text box "add the following to description" appears and is a required field (red asterisk).

Add The Following To Description\*:

To paste text into this field, click the icon with the letter T, or press CTRL+V. That will open a pop-up window that allows you to paste in the text. Click "insert" to add the text to the field. Note: you may need to allow pop-ups for this site.

The image shows a rich text editor interface. At the top, there is a toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent Left, Indent Right, Text Color, Background Color, and a dropdown menu with 'ABC'. Below the toolbar is a large, empty text area for entering content.

- III. At the bottom of the form for step three, the "Go Back" takes the user back to step two in the process.
- IV. "Save Draft" saves the modification in draft notice.
- V. "Quit Process and Return" does not save the modification.
- VI. "Proceed" takes the user to the next step in notice modification process.

**Go Back** **Save Draft** **Quit Process And Return** **Proceed**



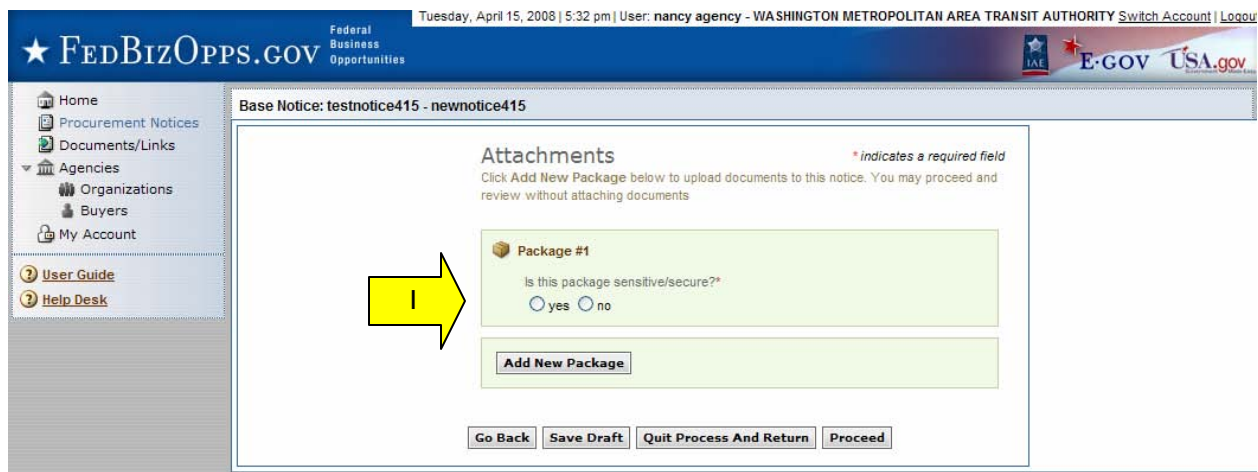
- I. The next step allows the user to attach documents or packages to the notice. A Package is simply a collection of Documents bundled together for review.
- II. If a user does not wish to attach any documents/packages, they may use "proceed" button to move to the next step without attaching any documents.
- III. Click "Add New Package" to upload documents to the notice. Users can either submit materials themselves, or attach secured documents (or both).

The screenshot displays the FEDBIZOPPS.GOV website interface. The header includes the site logo, the text "Federal Business Opportunities", and the date/time "Tuesday, April 15, 2008 | 6:38 pm | User: nancy agency - Sample Agency in FBO Test | Switch Account | Logout". The navigation menu on the left lists: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled "New Modification for new admin inter - 777666327" and contains the "Attachments" section. The "Attachments" section includes the text "Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents" and a green "Add New Package" button. Below the button are four buttons: "Go Back", "Save Draft", "Quit Process And Return", and "Proceed". A yellow arrow points to the "Add New Package" button, and another yellow arrow points to the "Proceed" button.

## Sensitive, but Unclassified, Attachments

NOTE: If export control, or explicit access, are required on any of the solicitation's sensitive, but unclassified packages, then all sensitive, but unclassified packages attached to that solicitation will take on those requirements. So for instance if "attachment A" is export controlled and "attachment B" is explicit access, the solicitation as a whole will require that both explicit access and export control requirements are satisfied by the vendor before either package can be reviewed.

- I. When a user is adding a new package, the first step is to indicate whether the attachment is a sensitive, but unclassified/secure package.
- II. If "no," see below "Non-Sensitive Attachments".



The screenshot shows the 'Attachments' section of the FEDBIZOPPS.GOV website. The page title is 'Base Notice: testnotice415 - newnotice415'. The main heading is 'Attachments' with a note that an asterisk indicates a required field. Below the heading, there is a text box for 'Package #1' and a question: 'Is this package sensitive/secure?\*' with radio buttons for 'yes' and 'no'. A yellow arrow with the letter 'I' points to the 'yes' radio button. Below the question is an 'Add New Package' button. At the bottom of the form are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'. The left sidebar contains navigation links for Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The top navigation bar includes the date and time (Tuesday, April 15, 2008 | 5:32 pm), the user name (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for Switch Account and Logout. Logos for IAE, E-GOV, and USA.gov are also visible.

- I. If attaching sensitive, but unclassified, the user is given the option to enter a new package or to select an existing (enter the PR# and use the "find package" button).

Tuesday, April 15, 2008 | 5:32 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Log](#)

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Base Notice: testnotice415 - newnotice415

### Attachments \* indicates a required field

Click **Add New Package** below to upload documents to this notice. You may proceed and review without attaching documents.

**Package #1**


Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

Enter PR# To Search Existing\*:  
Use "find package" to find that pr on the system if it already exists.



- I. If adding new, a form will present that allows the user to set up the package. Users can either create a new package or select an existing package.
- II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

## Attachments \* indicates a required field

Click **Add New Package** below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

PR #\*:

Label\*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled?\*

yes  no

Explicit Access\*:

yes  no

Is CD Available\*:

yes  no

---

**File / Link #1**

File\*:

For files over 10 Mb, please use the Large Upload button. It requires Java to be installed on your system, and your browser needs to allow popups from this site.

If Uploaded File is compressed (.zip), check here to unzip after

- I. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.
- II. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.

The screenshot displays a web form for configuring a package. At the top, there are three radio button options: "Is this Export Controlled?" (yes/no), "Explicit Access\*" (yes/no), and "Is CD Available\*" (yes/no). Below these is a section titled "File / Link #1" which includes a "File\*" label, a note about 10 Mb file size, a "Browse..." button, a "Large Upload" button, and a checkbox for "If Uploaded File is compressed (.zip), check here to unzip after uploading". A "Description\*" label is followed by a text area for "Enter in a short description for this file/link". Below the form is a button labeled "Add Another File / Link To This Package". At the bottom of the form area is a button labeled "Add New Package". At the very bottom of the page are four navigation buttons: "Go Back", "Save Draft", "Quit Process And Return", and "Proceed". A yellow arrow with the number "11" points to the "Proceed" button.

## Non-Sensitive Attachments

- I. If the user is attaching a document that is not sensitive, they should mark Is this package sensitive/secure? "no".
- II. Next, users are prompted to enter the "package type" (available package type options will align with the notice type).
- III. On the file "Type" field, the user indicates whether or not the material to upload is either a file or a "link"
- IV. If "upload" is chosen, the user is asked to specify the filename (note, user can use "browse" option to find the file) and to specify if the file is compressed (in .zip format). If "link" is chosen, the user is asked to specify the URL. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.
- V. Users are required to enter a description of the package.
- VI. After the document has been added, the user can add another document to this package or add another entirely new package.
- VII. "Go Back" button (bottom of form) takes the user back to step two in the process.
- VIII. "Save Draft" saves the materials to the draft notice.
- IX. "Quit Process and Return" does not attach the materials.
- X. "Proceed" takes the user to the next step in notice creation process.

Tuesday, April 15, 2008 | 6:24 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

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Base Notice: draft print - testtttt

### Attachments

\* indicates a required field  
Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Package Type\*:

Mod/Amendment cannot be selected for base notices.

Solicitation  
 Mod/Amendment  
 Other (Draft RFPs/RFs, Responses to Questions, etc.)

---

**File / Link #1**

Type\*:

Choose "upload" to select a file from your computer or choose "link" to enter in website URL

upload  link

Description\*:

Enter in a short description for this file/link

[Add Another File / Link To This Package](#)


[Add New Package](#)

[Go Back](#)
[Save Draft](#)
[Quit Process And Return](#)
[Proceed](#)


- I. At step five, the user is able to review materials, and if appropriate to “post” the modification/amendment for vendor review.
- II. “Go back” allows the user to go back in the stepwise process.
- III. The “save draft” button saves the modifications in draft format.
- IV. “Quit Process And Return” returns the user to the previous navigation.
- V. “Post” moves the notice for review by users.

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the header includes the site logo, the text 'Federal Business Opportunities', and the user's session information: 'Tuesday, April 15, 2008 | 6:40 pm | User: nancy agency - Sample Agency in FBO Test | Switch Account | Logout'. A navigation menu on the left lists 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account', along with 'User Guide' and 'Help Desk' links. The main content area is titled 'New Modification for new admin inter - 777666327'. It features a green instruction box with a lightbulb icon that reads: 'On this step: Please review your notice information. If satisfied, click post to finalize your notice. You may click save draft to save your work for a later time, or can click go back to modify the information.' Below this box are five buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', 'Print', and 'Post'. A yellow arrow labeled 'V' points to the 'Post' button. The 'Modification Details' section contains the following information: 'Where do you want to start the modification process: Notice Details, add/edit description'; 'Do you want to change the existing description or simply add to it?: Add To Description'; 'Notice Details' section with 'Solicitation #: 777666327', 'Procurement Type: Modification/Amendment', and 'Date Posted: April 15, 2008'; 'Title: new admin inter'; and 'Description: Added: Mar 27, 2008 1:06 pm sample solicitation'.

### 4.3 Create Award

- I. From any page on the system, a user can go to upper navigation "Notices" button and then use the create award button to add an award to the notice. Look for: 
- II. Additionally, a user can use the quicklink "create award" on their "My FBO" page to modify / amend a notice.
- III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.

Tuesday, April 15, 2008 | 6:28 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

**FEDBIZOPPS.GOV** Federal Business Opportunities 

**Procurement Notices** [Return](#)

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords/SOL #:  [Less](#)










Type:  Presolicitation  Combined Synopsis/Solicitation  Sources Sought  Special Notice

Modification/Amendment/Cancel  Sale of Surplus Property  Award Notice

Foreign Government Standard

Date Posted:  [Select](#) [Clear](#) to  [Select](#) [Clear](#)

[Go](#) [Clear](#)

Items 1-20 of 30								Jump <input type="text" value="1"/>   <a href="#">Next &gt;</a>
Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
  	2nd explicit access make sure not universal status for all	estate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am
<small>MODIFICATIONS / AWARDS:</small> Name: Modification 9 Posted: Apr 15, 2008 Name: Modification 8 Posted: Mar 29, 2008 Name: Modification 7 Posted: Mar 27, 2008 Name: Modification 6 Posted: Mar 25, 2008 Name: Modification 5 Posted: Mar 25, 2008 Name: Modification 4 Posted: Mar 25, 2008 Name: Modification 3 Posted: Mar 25, 2008 Name: Modification 2 Posted: Mar 23, 2008 Name: Modification 1 Posted: Mar 23, 2008								
  	Another test	456987123	Combined Synopsis/Solicitation	test section	5	✓	Mar 31, 2008 2:15 pm	Mar 25, 2008 12:01 pm
  	asdfasdf	asdfasdf	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:45 pm



- I. In creating an award notice, the user is required to enter the contract award date, contract award number, contract dollar amount, and awarded contractor name.
- II. Contract Line Item Number and Contractor Awarded Address are not required fields.

Tuesday, April 15, 2008 | 6:43 pm | User: nancy agency - Sample Agency in FBO Test [Switch Account](#) | [Logout](#)

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**New Award for new admin inter - 777666327**

### Notice Details

*\* indicates a required field*

Please enter in contract award details below. Note that many fields are locked and cannot be changed from the base notice. When are you satisfied with your changes, you can click save draft to save this Award for later. Otherwise, click proceed to review your information

Solicitation #: 777666327	Procurement Type: <b>Award Notice</b>	Date Posted: April 15, 2008
------------------------------	--	--------------------------------

Title\*:  
Brief title description of services, supplies, or project required by the posting agency.  
Note: 256 character limit.

Classification Code:  
Service or supply code number. Each synopsis shall classify the contemplated contract action under the one classified code which most closely describes the acquisition. If the action is for a multiplicity of goods and/or services, the preparer should select the one category best describing the overall acquisition based upon value.

NAICS Code:  
Type the NAICS code to search for NAICS codes  
  
[Having Problems With This Field? Click Here.](#)

Contract Award Date\*:  
The date the contract was awarded

Contract Award Number\*:  
Agency assigned number for control, tracking, and identification.  
Please use ONLY alphanumeric and - \_ ( ) characters [no spaces].

Contract Award Dollar Amount\*:  
The dollar value of this contract plus optional multiple text (e.g. "not to exceed \$250,000")

- III. The form is too long to capture in a screen shot. Users should work through the form in sequence.
- IV. At the bottom of the form, the "save draft" button saves the award in draft format.
- V. "Quit Process and Return" returns the user to the list of notices
- VI. "Go back" allows the user to go back in the stepwise process.
- VII. "Proceed" moves the user forward in the stepwise process.

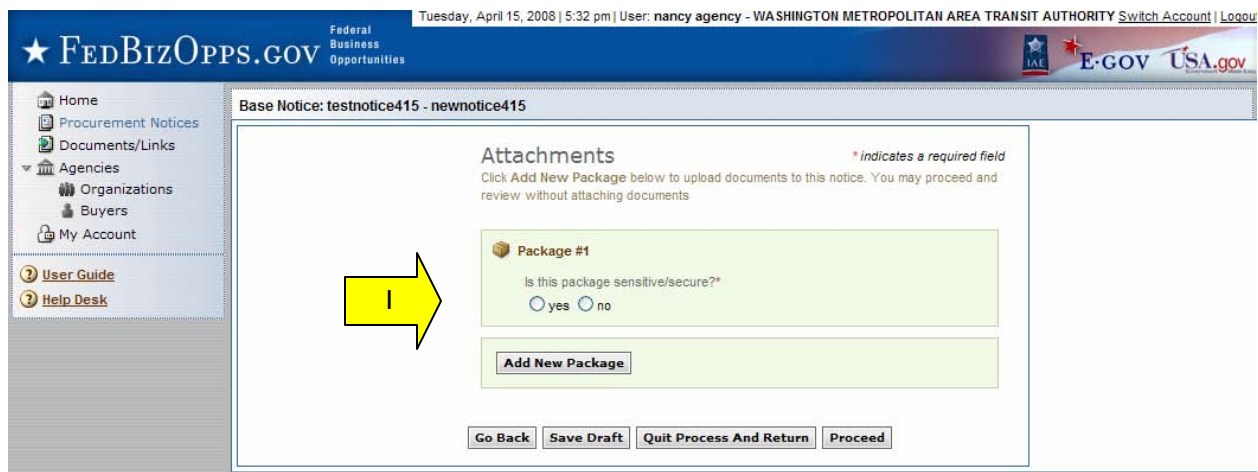
- I. The next step allows the user to attach documents or packages to the award notice. A Package is simply a collection of Documents bundled together for review.
- II. If a user does not wish to attach any documents/packages, they may use "proceed" button to move to the next step without attaching any documents.
- III. Click "Add New Package" to upload documents to the notice. Users can either submit materials themselves, or attach secured documents (or both).

The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text "Federal Business Opportunities", and the date/time "Tuesday, April 15, 2008 | 6:47 pm". The user is identified as "nancy agency - Sample Agency in FBO Test" with links for "Switch Account" and "Logout". The main content area is titled "New Award for new admin inter - 777666327" and contains an "Attachments" section. Below the title, there is a text box with the instruction: "Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents". A yellow arrow with the Roman numeral "III" inside points to the "Add New Package" button. At the bottom of the section are four buttons: "Go Back", "Save Draft", "Quit Process And Return", and "Proceed".

## Sensitive, but Unclassified, Attachments

NOTE: If export control, or explicit access, are required on any of the solicitation's sensitive, but unclassified packages, then all sensitive, but unclassified packages attached to that solicitation will take on those requirements. So for instance if "attachment A" is export controlled and "attachment B" is explicit access, the solicitation as a whole will require that both explicit access and export control requirements are satisfied by the vendor before either package can be reviewed.

- I. When a user is adding a new package, the first step is to indicate whether the attachment is a sensitive, but unclassified/secure package.
- II. If "no," see below "Non-Sensitive Attachments".



The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text "Federal Business Opportunities", and the date "Tuesday, April 15, 2008 | 5:32 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Switch Account | Logout". There are also logos for IAE, E-GOV, and USA.gov.

The main content area is titled "Base Notice: testnotice415 - newnotice415". Below this is the "Attachments" section, which includes the instruction: "Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents".

The "Attachments" section contains a form for "Package #1". The first question is "Is this package sensitive/secure?\*", with radio buttons for "yes" and "no". A yellow arrow points to this question. Below the question is an "Add New Package" button.

At the bottom of the form are four buttons: "Go Back", "Save Draft", "Quit Process And Return", and "Proceed".

- I. If attaching sensitive, but unclassified, the user is given the option to enter a new package or to select an existing (enter the PR# and use the "find package" button).

Tuesday, April 15, 2008 | 5:32 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Log](#)

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Base Notice: testnotice415 - newnotice415

### Attachments \* indicates a required field

Click **Add New Package** below to upload documents to this notice. You may proceed and review without attaching documents.

**Package #1**

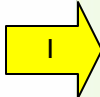
Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

Enter PR# To Search Existing\*:  
Use "find package" to find that pr on the system if it already exists.



- I. If adding new, a form will present that allows the user to set up the package. Users can either create a new package or select an existing package.
- II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

## Attachments

*\* indicates a required field*

Click **Add New Package** below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

PR #\*:

Label\*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled?\*

yes  no

Explicit Access\*:

yes  no

Is CD Available\*:

yes  no

---

**File / Link #1**

File\*:

For files over 10 Mb, please use the Large Upload button. It requires Java to be installed on your system, and your browser needs to allow popups from this site.

If Uploaded File is compressed (.zip), check here to unzip after


- I. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.
- II. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.

Is this Export Controlled?  yes  no

Explicit Access\*:  yes  no

Is CD Available\*:  yes  no

---

 **File / Link #1**

File\*:  
For files over 10 Mb, please use the Large Upload button. It requires Java to be installed on your system, and your browser needs to allow popups from this site.

If Uploaded File is compressed (.zip), check here to unzip after uploading

Description\*:  
Enter in a short description for this file/link

---

---

## Non-Sensitive Attachments

- I. If the user is attaching a document that is not sensitive, they should mark Is this package sensitive/secure? "no".
- II. Next, users are prompted to enter the "package type" (available package type options will align with the notice type).
- III. On the file "Type" field, the user indicates whether or not the material to upload is either a file or a "link"
- IV. If "upload" is chosen, the user is asked to specify the filename (note, user can use "browse" option to find the file) and to specify if the file is compressed (in .zip format). If "link" is chosen, the user is asked to specify the URL. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.
- V. Users are required to enter a description of the package.
- VI. After the document has been added, the user can add another document to this package or add another entirely new package.
- VII. "Go Back" button (bottom of form) takes the user back to step two in the process.
- VIII. "Save Draft" saves the materials to the draft notice.
- IX. "Quit Process and Return" does not attach the materials.
- X. "Proceed" takes the user to the next step in notice creation process.

Tuesday, April 15, 2008 | 6:24 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

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Base Notice: draft print - testtttt

### Attachments

\* indicates a required field  
Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents

**Package #1**

Is this package sensitive/secure?\*

yes  no

Package Type\*:

Mod/Amendment cannot be selected for base notices.

Solicitation  
 Mod/Amendment  
 Other (Draft RFPs/RFs, Responses to Questions, etc.)

**File / Link #1**

Type\*:  
Choose "upload" to select a file from your computer or choose "link" to enter in website URL

upload  link

Description\*:  
Enter in a short description for this file/link

X

- I. At the final step in the process, the user is able to review materials, and if appropriate to “post” the modification/amendment for vendor review.
- II. “Go back” allows the user to go back in the stepwise process.
- III. The “save draft” button saves the modifications in draft format.
- IV. “Quit Process And Return” returns the user to the previous navigation
- V. “Post” moves the award notice for review by users.

The screenshot shows the FEDBizOPPS.GOV website interface. The top navigation bar includes the site logo, the text 'Federal Business Opportunities', and the user's session information: 'Tuesday, April 15, 2008 | 6:50 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)'. The left sidebar contains a menu with items: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled 'New Award for new admin inter - 777666327'. A green callout box with a lightbulb icon contains the text: 'On this step: Please review your notice information. If satisfied, click **post** to finalize your notice. You may click **save draft** to save your work for a later time, or can click **go back** to modify the information.' Below this box are five buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', 'Print', and 'Post'. A yellow arrow with the letter 'V' points to the 'Post' button. Below the buttons is the 'Notice Details' section, which displays the following information:

Solicitation #:	Procurement Type:	Date Posted:
777666327	<b>Award Notice</b>	April 15, 2008

Below the table, the text 'Title:' is visible.



## 4.4 Cancel Notice

I. From any page on the system, a user can go to upper navigation “Notices” button and then use the cancel award button to cancel the notice. Look for:



II. Additionally, a user can use the quicklink “cancel notice” on their “My FBO” page to cancel a notice.

III. If an award is being cancelled, the user is prompted to enter additional text that will be highlighted to vendors reviewing the cancelled notice.

Tuesday, April 15, 2008 | 6:28 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | [Switch Account](#) | [Logout](#)

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### Procurement Notices

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords/SOL #:  [Less](#)

Type:  Presolicitation  Combined Synopsis/Solicitation  Sources Sought  Special Notice  
 Modification/Amendment/Cancel  Sale of Surplus Property  Award Notice

Date Posted:  [Select](#) [Clear](#) to  [Select](#) [Clear](#)

[Go](#) [Clear](#)

Response Date:  [Select](#) [Clear](#) to  [Select](#) [Clear](#)

Items 1-20 of 30 | Jump  | [Next >](#)

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	2nd explicit access make sure not universal status for all	estate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am
MODIFICATIONS / AWARDS: Name: <a href="#">Modification 9</a> Posted: Apr 15, 2008 Name: <a href="#">Modification 8</a> Posted: Mar 29, 2008 Name: <a href="#">Modification 7</a> Posted: Mar 27, 2008 Name: <a href="#">Modification 6</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 5</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 4</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 3</a> Posted: Mar 25, 2008 Name: <a href="#">Modification 2</a> Posted: Mar 23, 2008 Name: <a href="#">Modification 1</a> Posted: Mar 23, 2008								
	Another test	456987123	Combined Synopsis/Solicitation	test section	5	✓	Mar 31, 2008 2:15 pm	Mar 25, 2008 12:01 pm
	asdfasdf	asdfasdf	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:45 pm

- I. If an award is being cancelled, the user is prompted to enter additional text that will be highlighted to vendors reviewing the cancelled notice.

Tuesday, April 15, 2008 | 6:54 pm | User: nancy agency - Sample Agency in FBO Test [Switch Account](#) | [Logout](#)

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Cancellation for new admin inter - 777666327

**Cancellation Details** \* indicates a required field  
Please provide a cancellation notice

Solicitation #: 777666327	Procurement Type: <b>Cancellation</b>	Date Posted: April 15, 2008
------------------------------	--	--------------------------------

Title:  
Brief title description of services, supplies, or project required by the posting agency.  
Note: 256 character limit.  
new admin inter

Cancellation Description\*:  
To paste text into this field, click the icon with the letter T, or press CTRL+V. That will open a pop-up window that allows you to paste in the text. Click "insert" to add the text to the field. Note: you may need to allow pop-ups for this site.

**B I U** [List Icons] [Checkmark]

**Go Back** **Save Draft** **Quit Process And Return** **Proceed**

- II. At the bottom of the form, the "Go Back" button takes the user back to step two in the process
- III. "Save Draft" saves the materials to the draft notice.
- IV. "Quit Process and Return" does not attach the materials.
- V. "Proceed" takes the user to the next step in notice creation process.

**Go Back** **Save Draft** **Quit Process And Return** **Proceed**

- I. At step three, the user is able to review materials, and if appropriate to “post” the cancellation notice for vendor review.
- II. “Go back” allows the user to go back in the stepwise process.
- III. The “save draft” button saves the modifications in draft format.
- IV. “Quit Process And Return” returns the user to the previous navigation
- V. “Post” moves the cancellation notice for review by users.

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the header includes the site logo, the text 'Federal Business Opportunities', and user information: 'Tuesday, April 15, 2008 | 6:57 pm | User: nancy agency - Sample Agency in FBO Test | Switch Account | Logout'. A navigation menu on the left lists 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account', along with 'User Guide' and 'Help Desk' links. The main content area is titled 'Cancellation for new admin inter - 777666327'. It features a green box with a lightbulb icon and the text: 'On this step: Please review your notice information. If satisfied, click **post** to finalize your notice. You may click **save draft** to save your work for a later time, or can click **go back** to modify the information.' Below this is an action bar with buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', 'Print', and 'Post'. A yellow callout box with the letter 'V' points to the 'Post' button. The 'Notice Details' section provides the following information: Solicitation #: 777666327; Procurement Type: Cancellation; Date Posted: April 15, 2008; Title: new admin inter; Cancellation Description: cancelled per budget; Classification Code: 10 -- Weapons; NAICS Code: 313222 -- Schiffli Machine Embroidery; and Response Date: Mar 31, 2008 5:00 pm.

## 4.5 Deletion of Draft Notices

- I. A user can review all drafts from the main “procurement notices” list of notices. Draft items are indicated with a red x in the posted column.
- II. To delete a draft item, the user can click on the review icon for the list item to open the draft notice.

The screenshot shows the 'Procurement Notices' section of the FEDBIZOPPS.GOV website. The page header includes the date 'Tuesday, April 15, 2008 | 6:58 pm' and the user 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The navigation menu on the left includes 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account'. The main content area has tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Below the tabs are search filters for 'Keywords/SOL #', 'Type', and 'Date Posted'. The table below shows a list of notices with columns for 'Actions', 'Title', 'Sol/Ref Number', 'Type', 'Agency', 'Location', 'Posted', 'Response Deadline', and 'Modified'. The first row is a draft notice with a red 'X' in the 'Posted' column. A yellow arrow labeled 'II' points to the review icon in the 'Actions' column of this row. The second row is a published notice with a red 'X' in the 'Posted' column. A yellow arrow labeled 'I' points to the 'Posted' column of this row. The third row is a published notice with a green checkmark in the 'Posted' column. The fourth row is a published notice with a green checkmark in the 'Posted' column.

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	<a href="#">draft print</a>	testtttt	Presolicitation	test section	5	X	-	Apr 15, 2008 6:27 pm
	<a href="#">test</a>	test33	Combined Synopsis/Solicitation	test section	5	X	Mar 31, 2008 5:00 pm	Mar 30, 2008 3:57 pm
	<a href="#">test replication</a>	aabb	Presolicitation	test section	5	X	-	Apr 09, 2008 10:39 am
	<a href="#">testnotice415</a>	newnotice415	Presolicitation	test section	5	X	Apr 30, 2008	Apr 15, 2008 5:32 pm
	<a href="#">2nd explicit access make sure not universal status for all</a>	estate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am

- I. Within the notice use the "proceed" option to move forward to the "review/submit" step "
- II. When on the Review/Submit step, if the user selects "delete," they will be asked to confirm that they indeed want to delete the item. This is important to consider, as deleted drafts do not go to archives and because the process of deletion cannot be undone.

The screenshot displays the 'Base Notice: 1test replication - aabb' interface. The left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. A yellow arrow labeled 'I' points to the 'User Guide' link. The main content area shows a progress bar with four steps: 1 Notice Type, 2 Notice Details, 3 Attachments, and 4 Review/Submit. A red error box titled 'Required Fields Missing:' states: 'The following required fields have not been filled out on previous steps. Please go back and fill out all required fields before you can submit.' A red square indicates 'NAICS Code is required'. A green box titled 'On this step:' provides instructions: 'Please review your notice information. If satisfied, click post to finalize your notice. You may click save draft to save your work for a later time, or can click go back to modify the information.' Below the error and instruction boxes are buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', 'Delete', and 'Print'. A blue 'Windows Internet Explorer' dialog box is overlaid on the screen, asking: 'Are you sure you want to delete this entry? This cannot be undone.' The dialog has 'OK' and 'Cancel' buttons. A yellow arrow labeled 'II' points to the 'OK' button. The footer of the dialog reads '39 -- Materials handling equipment'.

## 4.6 Archive Notices

- I. A user can “archive” a notice from the main “procurement notices” list of notices. To archive a notice, the user can click on the review icon for the list item to open the draft notice.
- II. When the notice information tab is open, select the “archive” button to archive the notice.

FEDBIZOPPS.GOV Federal Business Opportunities

Tuesday, April 15, 2008 | 7:00 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Switch Account | Logout

Home | Procurement Notices | Documents/Links | Agencies | Organizations | Buyers | My Account | User Guide | Help Desk

**Procurement Notices** | Return

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords/SOL #:  Less

Type:  Presolicitation  Combined Synopsis/Solicitation  Sources Sought  Modification/Amendment/Cancel  Sale of Surplus Property  Special Notice  Foreign Government Standard  Award Notice

Date Posted:  Select Clear to  Select Clear

Go

Items 1-20 of 30 | Jump 1 | Next >

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	2nd explicit access make sure not universal status for all	estateate	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am

RELATED MODIFICATIONS / AWARDS:

- Name: [Modification 9](#) Posted: Apr 15, 2008
- Name: [Modification 8](#) Posted: Mar 29, 2008
- Name: [Modification 7](#) Posted: Mar 27, 2008
- Name: [Modification 6](#) Posted: Mar 25, 2008
- Name: [Modification 5](#) Posted: Mar 25, 2008
- Name: [Modification 4](#) Posted: Mar 25, 2008
- Name: [Modification 3](#) Posted: Mar 25, 2008
- Name: [Modification 2](#) Posted: Mar 23, 2008
- Name: [Modification 1](#) Posted: Mar 23, 2008

FEDBIZOPPS.GOV Federal Business Opportunities

Tuesday, April 15, 2008 | 7:00 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Switch Account | Logout

Home | Procurement Notices | Documents/Links | Agencies | Organizations | Buyers | My Account | User Guide | Help Desk

**Modification 9: 2nd explicit access make sure not universal status for all - estateate** | Return | Return To List (Procurement)

Notice Information | Packages | Interested Vendors

**Note:**  
This notice has been posted. Any changes must be done in the form a new modification/amendment notice

Return To List | Modify/Amend | **Archive** | Delete This Mod | Print

**Notice Information**

Solicitation: estateate

Agency/Office: test section

Location: 5

Title: 2nd explicit access make sure not universal status for all

Description(s):  
Added: Mar 23, 2008 2:58 pm  
asdfsdf

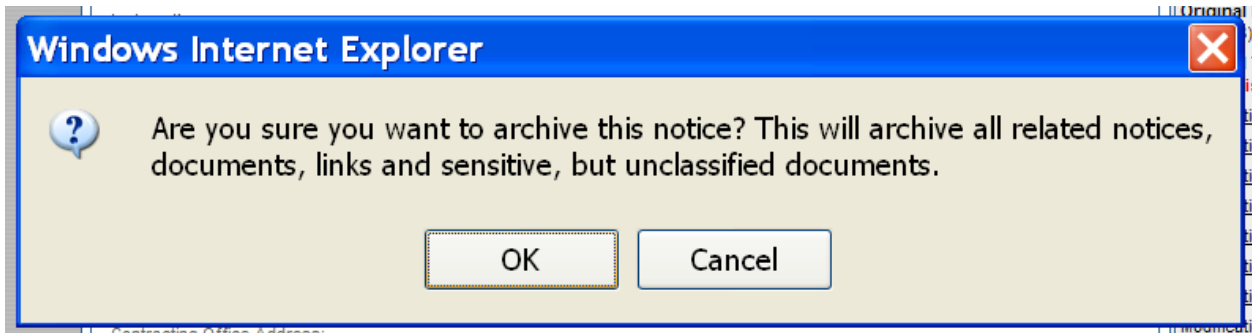
**Procurement Notice Info**

Created: April 15, 2008 9:28 am  
By:  
Modified: April 15, 2008 9:28 am  
By:

**Notice History**

Original Notice: [estateate](#) (Mar 23, 2008)  
Original Type: **Combined Synopsis/Solicitation**  
[Modification 1](#) (Mar 23, 2008)  
[Modification 2](#) (Mar 23, 2008)  
[Modification 3](#) (Mar 25, 2008)  
[Modification 4](#) (Mar 25, 2008)  
[Modification 5](#) (Mar 25, 2008)  
[Modification 6](#) (Mar 25, 2008)  
[Modification 7](#) (Mar 27, 2008)

1. User will be asked to confirm the "archive".



## 4.7 Unarchive Notices

- I. To review all archived notices, go to upper navigation "notices" and the sub-tab "archived".
- II. To unarchive the notice, from the archived sub tab, click on the view icon for the notice.

The screenshot shows the FedBizOpps.gov website interface. The top navigation bar includes the site logo and user information: "Tuesday, April 15, 2008 | 7:04 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY". The left sidebar contains navigation links like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The main content area is titled "Procurement Notices" and has tabs for "Procurement Notices", "Drafts", "Archived", and "Non-FBO Solicitations". The "Archived" tab is active. Below the tabs are search filters for Keywords/SOL #, Type (with checkboxes for Presolicitation, Combined Synopsis/Solicitation, Sources Sought, Modification/Amendment/Cancel, Sale of Surplus Property, Special Notice, Foreign Government Standard, and Award Notice), and Archived On dates. A table below shows one notice with a magnifying glass icon in the first column, which is pointed to by a yellow arrow. The table has columns for Title, Sol/Ref #, Agency, Location, Type, and Archived On.

Title	Sol/Ref #	Agency	Location	Type	Archived On
added export after original explicit added	testexpeport	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY test section 5	5	Award Notice	Mar 23, 2008 6:45 pm



- I. Select "unarchive" to return the notice and associated documents to active status.
- II. The system will prompt the user to confirm this operation.


The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, it displays the date and time (Tuesday, April 15, 2008 | 7:07 pm) and the user's name (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY). The main content area shows an archived award notice for 'Award: 5533hou / added export after original explicit added - testexpexport (Archived)'. A yellow box with a warning icon contains a note: 'Note: This award notice (and related documents) are archived.' Below this note are two buttons: 'Return To List' and 'Unarchive'. A yellow arrow points to the 'Unarchive' button. The page also includes a sidebar with navigation links like 'Home', 'Procurement Notices', and 'Documents/Links', and several information panels on the right such as 'Procurement Notice (Archived) Info', 'Notice History', and 'General Information'.

The dialog box has a light beige background and a blue border. On the left, there is a question mark icon. The text in the center reads: 'Are you sure you want to unarchive this notice? This will unarchive all related notices, documents, links and sensitive, but unclassified documents.' At the bottom, there are two buttons: 'OK' and 'Cancel'.

## 4.8 Print Notices

- I. Users can print both released and draft notices.
- II. For a non-draft notice, go to the notice list and select the review icon.
- III. When the notice is in review format, use the "Print" button to open a window that displays the notice in a printer friendly format.

The screenshot shows the 'Procurement Notices' section of the FEDBizOpps.gov website. The page includes a navigation menu on the left and a search/filter area at the top. Below the search area is a table of notices. A yellow arrow labeled 'I' points to the review icon (a magnifying glass) in the first row of the table.

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	added export after original explicit added	testexpexport	Award Notice	test section	5	Apr 15, 2008 7:13 pm	-	Apr 15, 2008 7:13 pm

RELATED MODIFICATIONS / AWARDS:

- Line: Award Posted: Mar 23, 2008
- Line: Modification 3 Posted: Mar 23, 2008
- Line: Modification 2 Posted: Mar 23, 2008
- Line: Modification 1 Posted: Mar 23, 2008

The screenshot shows the 'Notice Information' page for an award notice. The page includes a navigation menu on the left and a search/filter area at the top. Below the search area is a 'Notice Information' section with a yellow warning box and a 'Print' button. A yellow arrow labeled 'II' points to the 'Print' button.

**Award: 5533hou / added export after original explicit added - testexpexport**

**Note:**  
This is an Award Notice for solicitation testexpexport

[Return To List](#) [Archive](#) [Delete This Award](#) [Print](#)

**Notice Information**

Solicitation:  
testexpexport

Agency/Office:  
test section

Location:  
5

Title:  
added export after original explicit added

Contract Award Date:..

**Procurement Notice Info**

Created: March 23, 2008 5:52 pm  
By: nancy both  
Modified: April 15, 2008 7:13 pm  
By: nancy both

**Notice History**

**Original Notice:** testexpexport (Mar 23, 2008)  
**Original Type:** Combined Synopsis/Solicitation  
**Modification 1** (Mar 23, 2008)  
**Modification 2** (Mar 23, 2008)  
**Modification 3** (Mar 23, 2008)  
Award (Mar 23, 2008)

- I. In the print window, "print" sends the notice to the printer.
- II. Use "Close" to close the print window.

Press **Print** or select **File » Print** from the browser menu to open the print dialog.

**Award: 5533hou / added export after original explicit added - testexpexport**

---

<b>Notice Type:</b> Award Notice	<b>Original Posted Date:</b> March 23, 2008
<b>Posted Date:</b> March 23, 2008	<b>Original Response Date:</b> Mar 31, 2008 5:00 pm
<b>Response Date:</b> -	
<b>Archiving Policy:</b> Automatic, 15 days after response date	
<b>Original Archive Date:</b> -	
<b>Archive Date:</b> -	
<b>Classification Code:</b> A -- Research & Development	
<b>NAICS Code:</b> 111 -- Crop Production/111130 -- Dry Pea and Bean Farming	

---

- II. For draft notices, the print option is available at the "review/submit" step of the notice

## 4.9 Review Interested Vendors List

- I. To review the "interested vendors list" for a solicitation, use the review icon to open the solicitation from the procurement notices list.
- II. Go to the "interested vendors" sub-tab.

Thursday, April 17, 2008 | 12:28 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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Keywords/SOL #:  More Go

Items 1-20 of 31 Jump 1 | Next >

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	417buyersol	78979a8sd7f	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 17, 2008 11:33 am
RELATED MODIFICATIONS / AWARDS:								
Name: Modification 1 Posted: Apr 17, 2008								
	test solicitation	alphasolnum	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 16, 2008 4:00 pm
RELATED MODIFICATIONS / AWARDS:								
Name: Modification 1 Posted: Apr 16, 2008								
	test replication	aabb	Presolicitation	test section	5	✗	-	Apr 17, 2008 9:58 am
	added export after original explicit added	testexpexport	Award Notice	test section	5	✓	-	Apr 15, 2008 7:13 pm
RELATED MODIFICATIONS / AWARDS:								
Name: Award Posted: Mar 23, 2008								
Name: Modification 3 Posted: Mar 23, 2008								
Name: Modification 2 Posted: Mar 23, 2008								
Name: Modification 1 Posted: Mar 23, 2008								
	asdfsadf	asdfsadf	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:45 pm

Thursday, April 17, 2008 | 12:26 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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417buyersol - 78979a8sd7f

Notice Information Packages Interested Vendors

Keywords:  Go

Results: Items 1-1 of 1

Actions	Last Name	First Name	Email	Contractor	Phone	Address
	Vendor	Alan	test10@symplicity.com, nspettit@yahoo.com, btmnsp@gmail.com	LOEB, H CORP	201-874-7854	419 SAWYER ST NEW BEDFORD MA 027461013

Add New Interested Vendor Items 1-1 of 1

## 5 Non-FBO Secure Document Link

Users can create links to documents posted in FBO for viewing outside the context of FBO notices. These sorts of links were previously managed through FedTeds.

### 5.1 Create Non-FBO Secure Document Link

- I. From procurement notices navigation, go to Non-FBO Solicitation sub-tab to see list of Non-FBO Solicitations.
- II. Red x in the released column indicates the Non-FBO solicitation is in draft format (not released yet). A date in this column, means the Non-FBO solicitation was released on this date.
- III. Click "Add New Non-FBO Solicitation" to create a new Non-FBO solicitation link.

The screenshot shows the FEDBizOpps.gov website interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 7:16 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for Switch Account and Logout. The main content area is titled "Non-FBO Solicitations" and features a search bar with a "More" and "Go" button. Below the search bar is a table with the following data:

Actions	Sol/Ref #	Created on	Released
	32608	Mar 26, 2008 2:29 pm	✘
	58979	Mar 25, 2008 6:08 pm	✘
	8a7dsf097	Mar 25, 2008 6:09 pm	Apr 11, 2008 9:30 am
	deleteion	Apr 15, 2008 9:27 am	Apr 15, 2008 9:27 am

At the bottom of the table, there is a button labeled "Add New Non-FBO Solicitation" and a link for "Items 1-4 of 4". A yellow arrow points to the "Add New Non-FBO Solicitation" button, and another yellow arrow points to the "Non-FBO Solicitations" tab at the top of the content area.

- I. The first step of creating a Non-FBO Secure Document Link is essentially a simplified version of the notice form. This form only captures three key elements:
  - i. the archive date
  - ii. point of contact(s)
  - iii. solicitation #.
- II. Note, solicitation # and archive date (not shown in image below) must be entered before the "save draft" button can be used to save the Non-FBO Solicitation in draft format.
- III. "Cancel" returns the user to the list of Non-FBO Solicitations (at bottom of form, not shown in screen shot).
- IV. "Proceed" takes the user to the next step in the process (at bottom of form, not shown in screen shot).

Thursday, April 17, 2008 | 12:53 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | [Logout](#)

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**[New Non-FBO Solicitation]**

### 1 Details

*\* indicates a required field*

Please enter the details for this non-fbo solicitation

Agency/Office\*:  
You may choose an agency from your level and below  
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Contracting Office Location\*:  
You are not registered at the office location level. Please select the related office location

Solicitation #\*:  
Enter the solicitation number

Primary Point of Contact\*:  
Select the primary point of contact

Select an Existing or New Contact:  
nancy agency (test-3@symplicity.com)

Title:  
admin

Full Name:  
nancy agency

Email:  
test-3@symplicity.com

Phone:

Fax:

Secondary Point of Contact:

2 Packages

3 #/Submit

- I. The next step of creating a Non-FBO form allows the user to add the secured package(s).
- II. The user can create new or attach/select existing secured package.
- III. Contingent on the response, the system will prompt users to enter data as appropriate.
- IV. Use the "Attach Additional Secure Package" button to add additional packages to the Non-FBO Solicitation.
- V. "Go Back" takes the user back one step in the process (at bottom of form, not shown in screen shot).
- VI. Use the "save draft" button to save the Non-FBO Solicitation in draft format(at bottom of form, not shown in screen shot)..
- VII. "Cancel" returns the user to the list of Non-FBO Solicitations (at bottom of form, not shown in screen shot).
- VIII. "Proceed & Review" takes the user to the final step in the process (at bottom of form, not shown in screen shot).

Thursday, April 17, 2008 | 12:55 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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[New Non-FBO Solicitation]

1 Details  
2 **Attach Packages**  
3 Review and Submit

Attach Packages \* indicates a required field

Package #1

Do you want to create new or attach/select existing?\*

Create New  Attach/Select Existing

PR #\*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled?\*

Note: To download documents that are designated as "export controlled," vendors must be certified as a U.S. or Canadian contractor by the Joint Certification Program (JCP) administered by the Defense Logistic Information Service (DLIS). To apply for this certification, Vendors must submit [form DD2345](#).

yes  no

Explicit Access\*

Note: Vendors must be on the Authorized Parties List for attached solicitation to download documents designated as explicit access.

yes  no

Is CD Available?\*

yes  no

File #1

- I. The final step of creating a Non-FBO allows the user to review and submit materials.
- II. "Go Back" takes the user back one step in the process.
- III. Use the "save draft" button to save the Non-FBO Solicitation in draft format.
- IV. "Quit Process and Return" returns the user to the list of Non-FBO Solicitations
- V. "Release Solicitation" makes the Non-FBO solicitation link valid.

Thursday, April 17, 2008 | 12:56 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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**[New Non-FBO Solicitation]**

**1** Details  
**2** Attach Packages  
**3** Review/Submit

**Solicitation Details**

Agency/Office:  
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Solicitation #:  
ewiour

Primary Point of Contact:  
nancy engineer metro,  
test  
[nsp@oneagency.com](mailto:nsp@oneagency.com)

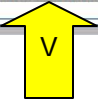

Archive Date:  
April 24, 2008

**Attach Packages**

**Package #1**  
PR #: reaar  
Is this Export Controlled?: yes  
Explicit Access: yes  
Is CD Available: yes

[tiffany.txt](#) (74.46 Kb)  
Description: asfdasdf

**Go Back** **Save Draft** **Quit Process And Return** **Release Solicitation**





- I. The link for the Non-FBO solicitation is presented in the notice when it is released.
- II. Vendors must log in after clicking that link and will see the uploaded packages - and can request access etc, same way they would for FBO Solicitation. Users will manage explicit access requests in the same way as described for FBO solicitations.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, the header includes the site logo, navigation tabs for 'Procurement Notices', 'Drafts', and 'Archived', and the current page title 'Non-FBO Solicitations'. A user is logged in as 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The main content area displays 'Solicitation Details' for a solicitation titled 'deletion'. A yellow arrow points to the 'Vendor Link' field, which contains the URL 'https://fbo-test.symplicity.com/fedteds/deletion'. Below this, there is an 'Attach Packages' section showing a package named 'Package #1' with details: PR #: deletion, Is this Export Controlled?: no, Explicit Access: yes, and Is CD Available: no. A file named 'testing.doc' (24.50 Kb) is listed with a description of 'test'. The left sidebar contains navigation links like 'Home', 'Procurement Notices', and 'My Account'. A 'Non-FBO Solicitation Info' table on the right shows creation and modification dates of April 15, 2008.

## 5.2 Un-release Non-FBO Secure Document Link

- I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional. Vendors trying to view the link of an unreleased Non-FBO solicitation will receive the following error message:  
NOTE: The Secure Documents link (formerly FedTeDS) you are trying to access cannot be found
- II. Un-released Non-FBO solicitations are returned to "draft" status on the list of Non-FBO solicitations. On that list, in the released date, a red x will display.
- III. To unreleased a previously released Non-FBO document, go to "Notices" and the "Non-FBO Solicitations" sub-tab. Click on the review tab to open the previously released item.

The screenshot shows the FedBizOpps.gov website interface. The main content area is titled "Non-FBO Solicitations" and includes a search bar and a table of results. The table has the following data:

Actions	Sol/Ref #	Created on	Released
	32608	Mar 26, 2008 2:29 pm	x
	58979	Mar 25, 2008 6:08 pm	x
	8a7dsf097	Mar 25, 2008 6:09 pm	Apr 11, 2008 9:30 am
	deleteion	Apr 15, 2008 9:27 am	Apr 15, 2008 9:27 am

At the bottom of the table, there is a link labeled "New Non-FBO Solicitation" with the text "Items 1-4 of 4" next to it. A yellow arrow points to this link from below. Another yellow arrow points to the "Released" column header from above.

- I. From the Details tab, use the “unreleased solicitation” button to unreleased the Non-FBO solicitation. When prompted, the user will need to confirm intended operation.
- II. If there is not an intention to re-release the solicitation, use “archive” to send the solicitation to archives. When prompted, the user will need to confirm intended operation.
- III. “Return” returns the user to the list of Non-FBO Solicitations

The screenshot shows the FedBizOpps.gov interface. At the top, the header includes the site logo, the date 'Tuesday, April 15, 2008 | 7:21 pm', and the user 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The main content area is titled 'Non-FBO Solicitation: deletion' and has tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Below these are sub-tabs for 'Details' and 'Authorized Parties'. A row of buttons includes 'Unrelease Solicitation', 'Return', and 'Archive'. A yellow arrow points to the 'Unrelease Solicitation' button. The 'Details' section shows: Agency/Office: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY/test section; Solicitation #: deletion; Primary Point of Contact:; Archive Date: April 22, 2008; Vendor Link: https://fbo-test.symplicity.com/fedteds/deletion. Below this is an 'Attach Packages' section with 'Package #1' containing a file 'testing.doc (24.50 Kb)' with description 'test'. A sidebar on the right contains 'Non-FBO Solicitation Info' with a table:

Created:	April 15, 2008 9:27 am
By:	
Modified:	April 15, 2008 9:27 am
By:	

## 5.3 Delete Draft Non-FBO Secure Document Link

- I. A user can review all drafts non-fbo solicitations from main "procurement notices" navigation and the sub-tab "non-fbo solicitations". Draft items are indicated with a red x in the released column.
- II. To delete a draft item, the user can click on the review icon for the list item to open the draft notice.

The screenshot shows the FEDBIZOPPS.GOV website interface. The main content area is titled "Non-FBO Solicitations" and includes tabs for "Procurement Notices", "Drafts", and "Archived". Below these tabs is a search bar and a table of solicitations. The table has four columns: "Actions", "Sol/Ref #", "Created on", and "Released". The "Released" column contains a red "x" for the first two rows, indicating draft status. A yellow arrow points to the "drafts" tab, and another yellow arrow points to the "Released" column header.

Actions	Sol/Ref #	Created on	Released
	32608	Mar 26, 2008 2:29 pm	x
	58979	Mar 25, 2008 6:08 pm	x
	8a7dsf097	Mar 25, 2008 6:09 pm	Apr 11, 2008 9:30 am
	deleteion	Apr 15, 2008 9:27 am	Apr 15, 2008 9:27 am

- I. Within the Non-FBO notice use the "proceed" option to move forward to the "review/submit" step "
- II. When on the Review/Submit step, if the user selects "delete," (appears at the bottom of the form), they will be asked to confirm that they indeed want to delete the item. This is important to consider, as deleted drafts do not go to archives and because the process of deletion cannot be undone.

Thursday, April 17, 2008 | 12:59 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | [Logout](#)

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Non-FBO Solicitation: ewiour

- 1 Details
- 2 Attach Packages
- 3 Review/Submit

**Note:**  
This solicitation and attached Secure Packages have not yet been released and are saved as draft. You may make modifications and submit when ready

### Solicitation Details

Agency/Office:  
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Solicitation #:  
ewiour

Primary Point of Contact:  
nancy engineer metro,  
test  
[nsp@oneagency.com](mailto:nsp@oneagency.com)

Archive Date:  
April 24, 2008

### Attach Packages

**Package #1**

PR #: reaeer  
Is this Export Controlled?: yes  
Explicit Access: yes  
Is CD Available: yes

---

[tiffany.txt](#) (74.46 Kb)  
Description: asfdasdf

[Go Back](#) [Save Draft](#) [Quit Process And Return](#) [Delete](#)

[Release Solicitation](#)

## 6 Manage Document Packages

(outside context of FBO Notice Creation)

### 6.1 Add New Document Package to Existing Notice

- I. From the "Document / Links" main navigation, users can create, and assign new documents to released solicitations.
- II. Use the "add new" button.
- III. Additionally, a user can use the quicklink "upload new docs/links" on their "My FBO" page to add a new package.
- IV. Note, if you create a new documents using this resource, and save the materials as drafts, the resources will remain as drafts in the system until they are posted, or deleted.

Thursday, April 17, 2008 | 9:21 am | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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Packages Authorized Parties

Keywords:  More Go Clear

Items 1-3 of 3

Label / PR #	Type	Solicitation	Created on	Posted On
33669989	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	22334455	Mar 25, 2008 10:22 am	Mar 25, 2008
8883lkias	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	alphasolnum	Apr 16, 2008 3:58 pm	Apr 16, 2008
1258964	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	1258964	Mar 26, 2008 4:06 pm	Mar 26, 2008

Download/View: [More docs](#)

Download/View: [image file](#)

Download/View: [secure doc](#)

Add New Items 1-3 of 3

- I. At step one, Details, the user indicates whether the document is sensitive, tied to a FBO solicitation, and completes the other elements of the document package creation process (fields will appear conditionally based on user responses).
- II. At the bottom of the form, "Save Draft" saves the materials to the draft notice, "Quit Process and Return" returns the user to the list of document packages and "Proceed" moves the user forward in the stepwise process.

Thursday, April 17, 2008 | 9:22 am | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY | Logout

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### [New Documents/Links]

#### 1 Details

#### Package Details

\* indicates a required field

Please enter the details for this document package

Agency/Office\*  
You may choose an agency from your level and below  
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

Contracting Office Location\*  
You are not registered at the office location level. Please select the related office location

Is this a secure/sensitive package?\*:  
 yes  no

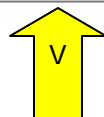
Save Draft   Quit Process And Return   Proceed

- I. At step two, the user uploads files.
- II. A "description" is required.
- III. Bottom of page, "Go back" allows the user to go back in the stepwise process.
- IV. "Save Draft" saves the materials to the draft notice.
- V. "Cancel" returns the user to the previous navigation.
- VI. "Proceed & Review" moves the user forward in the stepwise process.

The screenshot shows the 'New Documents/Links' page in the FEDBIZOPPS.GOV system. The page is titled 'Files / Attachments' and is in the 'Upload Files' step (step 2 of 3). The user is logged in as 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY' on Thursday, April 17, 2008, at 9:29 am. The page includes a navigation menu on the left with options like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The main content area has a 'File #1' section with a 'File\*' field, a 'Description\*' field, and buttons for 'Browse...', 'Large Upload', 'Remove This File', and 'Add Another File To This Package'. At the bottom, there are buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed & Review'. A yellow arrow points to the 'Proceed & Review' button, which is labeled 'VI'.



- I. At step three, "review/submit," the user is able to review materials, and if appropriate to use "post documents."
- II. "Go back" allows the user to go back in the stepwise process.
- III. "Save Draft" saves the materials to the draft notice.
- IV. "Cancel" returns the user to the previous navigation.
- V. "Release Package" adds the documents for use in the system.



## 6.2 Edit Document Package

- I. Note, if a package has been posted to a solicitation, the user will not be able to edit the package. Only packages that list "unassigned" in the solicitation column will have "edit" as an option when opened.
- II. To edit a document package, go to main navigation "document packages", and select the package link for the package to be edited. This opens the "details" of the package.
- III. When "details" are open, select the "edit" button.

Thursday, April 17, 2008 | 6:12 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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Documents/Links Packages Authorized Parties

Keywords:  More Go

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Label / PR #	Type	Solicitation	Created on	Posted On
123456	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	123456456	Mar 25, 2008 10:02 am	Mar 25, 2008
123aa	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008
58	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	58	Mar 25, 2008 4:02 pm	Mar 25, 2008

Thursday, April 17, 2008 | 6:14 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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test414 Details Audit Trail

**Note:**  
This is a sensitive, but unclassified document package.

Return Delete Edit

Agency/Office: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY/test section

Contract Location: 5

Is this a secure package?: yes

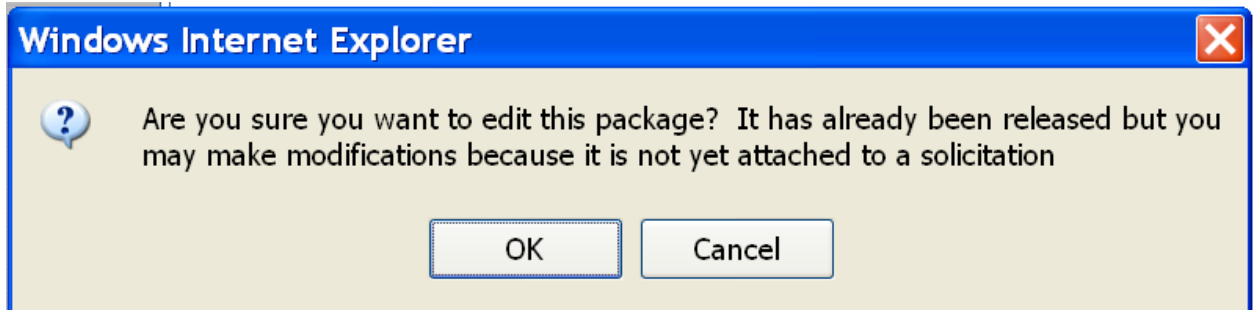
Is the related solicitation on FBO: no

Solicitation: .

Label: test414

PR #: 123aa

- I. After edit is selected, user see message indicating why edits are allowed, and will need to confirm the desire to make edits to the package.



- II. Users will be taken to step one of document creation and can progress as if the document had been previously saved as draft. See above for details on notice creation.

### 6.3 Delete Document Package

- I. Note, if a package has been posted to a solicitation, the user will not be able to delete the package. Only packages that list "unassigned" in the solicitation column will have "delete" as an option when opened.
- II. To delete a document package, go to main navigation "document packages", and select the package link for the package to be deleted. This opens the "details" of the package.
- III. When "details" are open, select the "delete" button.

Thursday, April 17, 2008 | 6:12 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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Documents/Links Packages Authorized Parties

Keywords:  More Go

Items 1-20 of 61 Jump 1 | Next

Label / PR #	Type	Solicitation	Created on	Posted On
123456	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	123456456	Mar 25, 2008 10:02 am	Mar 25, 2008
123aa	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008
58	Other (Draft RFPs/RFIs, Responses to Questions, etc..)		Mar 25, 2008 4:02 pm	Mar 25, 2008

Thursday, April 17, 2008 | 6:14 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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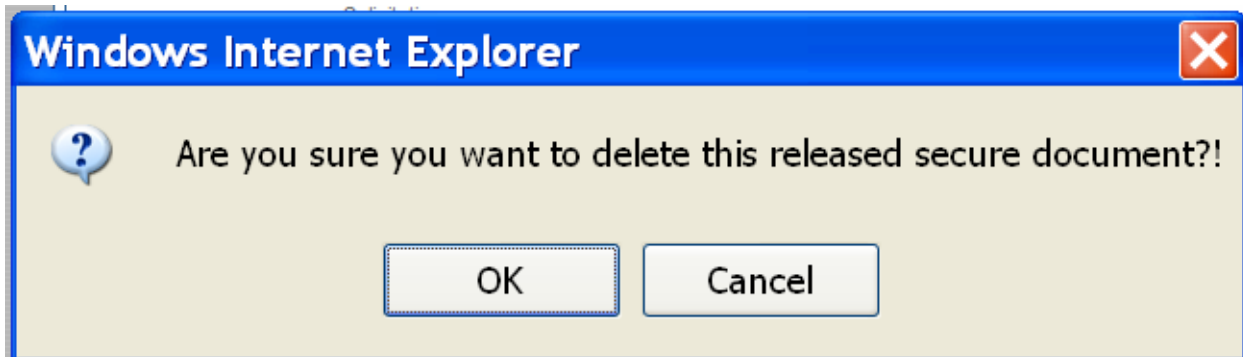
test414 Details Audit Trail

**Note:**  
This is a sensitive, but unclassified document package.

Return Delete Edit

Agency/Office: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY/test section  
 Agency Location: 5  
 Is this a sensitive package?: yes  
 Is this solicitation on FBO: no  
 Solicitation: -  
 Label: test414  
 PR #: 123aa

- I. After delete is selected, user sees message indicating why delete is allowed, and will need to confirm the desire to delete the package.

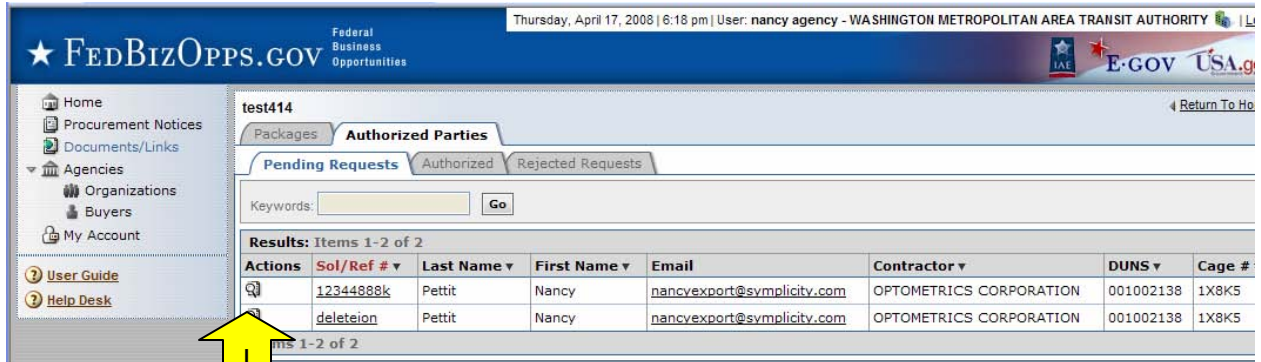


## 6.4 Manage Explicit Access Requests



- I. A user can see if they have any pending Explicit Access Requests on their home page in the Pending Actions display. Note this tally is specific to the account.
- II. Click on the presented link to navigate to the list of pending requests.
- III. Alternatively, a user can navigate to the "authorized parties" list from the "Document Packages" main navigation, and selecting the "authorized Parties" sub-tab.

The screenshot displays the FEDBizOpps.gov user interface. At the top, the header includes the site logo, the text "Federal Business Opportunities", and the user's session information: "Thursday, April 17, 2008 | 6:17 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY". A navigation menu on the left lists "Home", "Procurement Notices", "Documents/Links", "Agencies" (with sub-items "Organizations" and "Buyers"), and "My Account". Below this are "User Guide" and "Help Desk" links. The main content area is titled "Home" and features a "Pending Actions" section with a warning icon. It lists "2 Explicit Access Requests" and "0 Agency Coord. Registrations". A yellow arrow points to the "Explicit Access Requests" link. To the right, a "Statistics" section shows counts for "Active Procurement Notices" (30), "Archived Procurement Notices" (3), "Active Non-FBO Solicitations" (9), "Archived Non-FBO Solicitations" (2), "Active Document Packages" (58), and "Agency Users" (23). Below the statistics is an "Account Switcher" section with a dropdown menu set to "WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY" and a tip about switching accounts. At the bottom, an "Announcements" section states "There are no announcements at this time."

- I. The "authorized parties" list is divided into three sub-tabs: "pending requests," "authorized," and "rejected requests".
- II. To review a pending requests, click on the review icon for the request record.



The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text "Federal Business Opportunities", and the user information: "Thursday, April 17, 2008 | 6:18 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY". The main content area is titled "test414" and has tabs for "Packages", "Authorized Parties", and "Rejected Requests". Under "Authorized Parties", there are sub-tabs for "Pending Requests", "Authorized", and "Rejected Requests". A search bar with "Keywords:" and a "Go" button is present. Below the search bar, it says "Results: Items 1-2 of 2". A table displays the results with columns: Actions, Sol/Ref #, Last Name, First Name, Email, Contractor, DUNS, and Cage #. The table contains two rows of data for "OPTOMETRICS CORPORATION". A yellow arrow points to the review icon in the "Actions" column of the first row.

Actions	Sol/Ref #	Last Name	First Name	Email	Contractor	DUNS	Cage #
	12344888k	Pettit	Nancy	nancvexport@symplicity.com	OPTOMETRICS CORPORATION	001002138	1X8K5
	deleteion	Pettit	Nancy	nancvexport@symplicity.com	OPTOMETRICS CORPORATION	001002138	1X8K5

- I. When the review icon is clicked, the pending explicit access request record is opened.
- II. If the user is comfortable "approving" the request for access to the document, they select "approve" Approved vendors receive email notification that they have been granted explicit access to the document. If approved is selected, user will be asked to confirm action.
- III. To "reject" the request, select "reject" (see below for details on rejection).
- IV. If the user is not ready to do either action, use "quit process and return" to retain pending status on the record.

Thursday, April 17, 2008 | 6:19 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

FEDBIZOPPS.GOV Federal Business Opportunities

Home  
Procurement Notices  
Documents/Links  
Agencies  
Organizations  
Buyers  
My Account  
User Guide  
Help Desk

Approve/Reject Request

Return | Return To List (Authorized Parties)

Approved Parties

Note:  
You may approve or reject this vendor's request for explicit access to sensitive documents.  
Note: Approving this vendor will add them to the Authorized Party List for this solicitation.

Approve Reject Quit Process And Return

Pending Explicit Access Request

Status: pending  
The Notice on FBO: yes  
Solicitation #: 12344888k  
Vendor:  
Contractor:  
DUNS #: 001002138  
Name: OPTOMETRICS CORPORATION  
Cage #: 1X8K5  
Fullname: Nancy Selina Pettit  
First Name: Nancy  
Middle Name: Selina  
Last Name:

Authorized Vendors Info	
Created:	April 10, 2008 12:03
By:	Nancy Selina Pettit
Modified:	April 10, 2008 12:03
By:	Nancy Selina Pettit



- I. If "reject" was selected, the user will be prompted to provide text explaining the rejection. This information will be included in the rejection email received by the vendor.
- II. If a user changes their mind at this step, they can still use "quit process and return" button to retain the pending status of the explicit access request.
- III. "Save and Send Rejection" will change the request status to rejected and send vendor notification about rejection.

Thursday, April 17, 2008 | 6:20 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

**FEDBIZOPPS.GOV** Federal Business Opportunities

Home | Procurement Notices | Documents/Links | Agencies | Organizations | Buyers | My Account

[User Guide](#) | [Help Desk](#)

**Reject Request** | Packages | **Authorized Parties** | [Return](#) | [Return To List](#)

**Note:** Please add a reason for rejection

**Quit Process And Return** | **Save And Send Rejection** \* indicates a required field

**Reject Authorized Party Request**  
Please provide an explanation for this rejection. An email will be emailed to the vendor.

Status: **reject** (indicated by a yellow arrow)

Is the Notice on FBO: **yes**

Solicitation #: 12344888k

Vendor: Nancy Selina Pettit (Vendor Associates: 147852963)

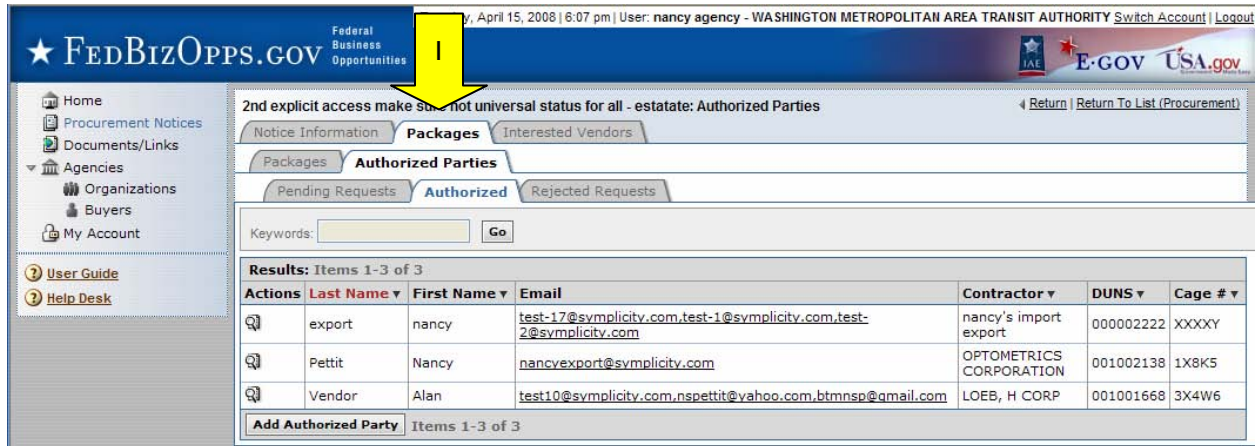
Rejection Note\*: Please provide a reason for this rejection

**Quit Process And Return** | **Save And Send Rejection**

**Authorized Vendor Information:**  
Created: April 10, 2008  
By: Nancy S...  
Modified: April 10, 2008  
By: Nancy S...

## 6.5 Review Authorized / Rejected Explicit Access Requests

- I. To review the previously authorized / rejected explicit access requests, got to the Notice of interest, and the “packages” sub-tab and the “authorized parties” sub-tab.
- II. Authorized vendors will be listed on the “authorized” sub-tab.
- III. Previously rejected requests will be listed on the “rejected requests” sub-tab.



2nd explicit access make sure not universal status for all - estate: Authorized Parties

Keywords:

Results: Items 1-3 of 3

Actions	Last Name	First Name	Email	Contractor	DUNS	Cage #
	export	nancy	test-17@symplicity.com,test-1@symplicity.com,test-2@symplicity.com	nancy's import export	000002222	XXXXY
	Pettit	Nancy	nancvexport@symplicity.com	OPTOMETRICS CORPORATION	001002138	1X8K5
	Vendor	Alan	test10@symplicity.com,nspettit@yahoo.com,btmnsp@gmail.com	LOEB, H CORP	001001668	3X4W6

Items 1-3 of 3

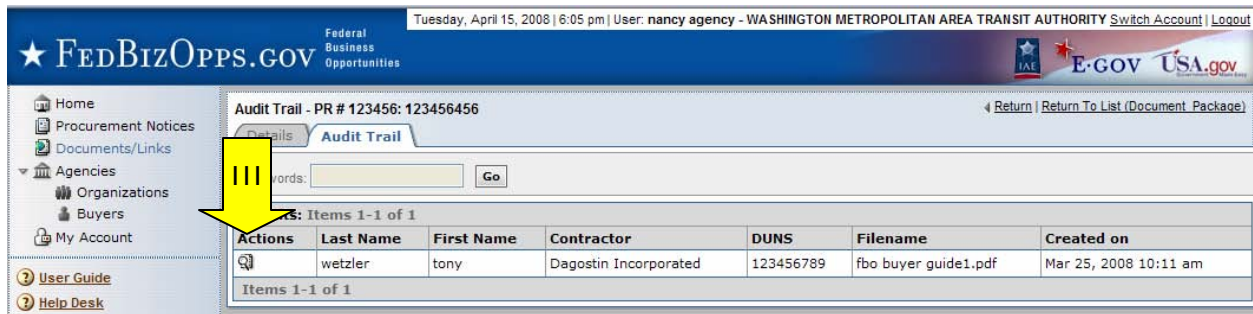
## 6.6 Document Audit Trail

- I. For sensitive, but unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the "audit trail" sub-tab of a released document.
- II. Go to main navigation "Document / Links." For the document package you would like to review, click on the package link (not the actually document file link(s)).


The screenshot shows the FEDRIZOPPS.GOV website interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 6:06 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for Switch Account and Logout. The left sidebar contains a navigation menu with items like Home, Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. A yellow arrow points to the 'Documents/Links' link in this menu. The main content area is titled 'Documents/Links' and features a search section with fields for Keywords, Secure (radio buttons for yes/no), Posted Date (with Select and Clear buttons), and Type (dropdown menu). Below the search section is a table of document items, showing columns for Label / PR #, Type, Solicitation, Created on, and Posted On. The table lists several items, including 123456, 123aa, 14785, and 170381, each with associated solicitation numbers and dates.

Label / PR #	Type	Solicitation	Created on	Posted On
123456	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	123456456	Mar 25, 2008 10:02 am	Mar 25, 2008
123aa	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008
14785	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	58979	Mar 25, 2008 4:02 pm	Mar 25, 2008
170381	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	123456	Mar 25, 2008 4:04 pm	Mar 27, 2008

- I. When the Document package record is opened, it defaults to the “details” sub-tab for the record. Click on the “audit” sub-tab, to review the listing of vendor review.
- II. On the “audit trail” sub-tab, the system will list out each time a document was viewed (note, if viewed multiple times by the same vendor, each occurrence will be reflected in the list.)
- III. Click the review icon to open the audit trail record.



The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 6:05 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for Switch Account and Logout. The left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The main content area is titled "Audit Trail - PR # 123456: 123456456" and features a search bar and a "Go" button. Below the search bar, it indicates "Items 1-1 of 1". A table displays the audit trail data:

Actions	Last Name	First Name	Contractor	DUNS	Filename	Created on
	wetzler	tony	Dagostin Incorporated	123456789	fbo buyer guide1.pdf	Mar 25, 2008 10:11 am

Below the table, it again indicates "Items 1-1 of 1". A yellow arrow points to the "Actions" column of the table.

- I. The "audit trail" record details the specifics of the secured, but unclassified, document review.
- II. "Return" closes the record.

Tuesday, April 15, 2008 | 6:05 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

**FEDBIZOPPS.GOV** [E-GoV](#) [USA.gov](#)

Home | Procurement Notices | Documents/Links | Agencies | Organizations | Buyers | My Account | [User Guide](#) | [Help Desk](#)

**Audit Trail - PR # 123456: 123456456** [Return](#) | [Return To List \(Log\)](#)

**Secure Package Log**

PR #: 123456  
 Sol/Ref #: 123456456  
 Filename: fbo buyer guide1.pdf  
 Vendor: Contractor:  
 DUNS #: 123456789  
 Name: Dagostin Incorporated  
 Doing Business As (DBA): Doing  
 Cage #: 12312323  
 Fullname: tony wetzler  
 Email: twetzler@svmpolcity.com  
 Phone: 5555555555

Action: download  
 Action Occured On: Mar 25, 2008 10:11 am  
 IP Address: 192.168.1.188

**Secure Document Log Info**

Created:	March 25, 2008 10:11 am
By:	tony wetzler
Modified:	March 25, 2008 10:11 am
By:	tony wetzler

[Return](#)

## 7 Manage Agencies


- I. As previously indicated, the user can review their agency, and any subordinate sub-agencies, by going to the "Agencies" main navigation and going to the "organizations" sub-navigation.

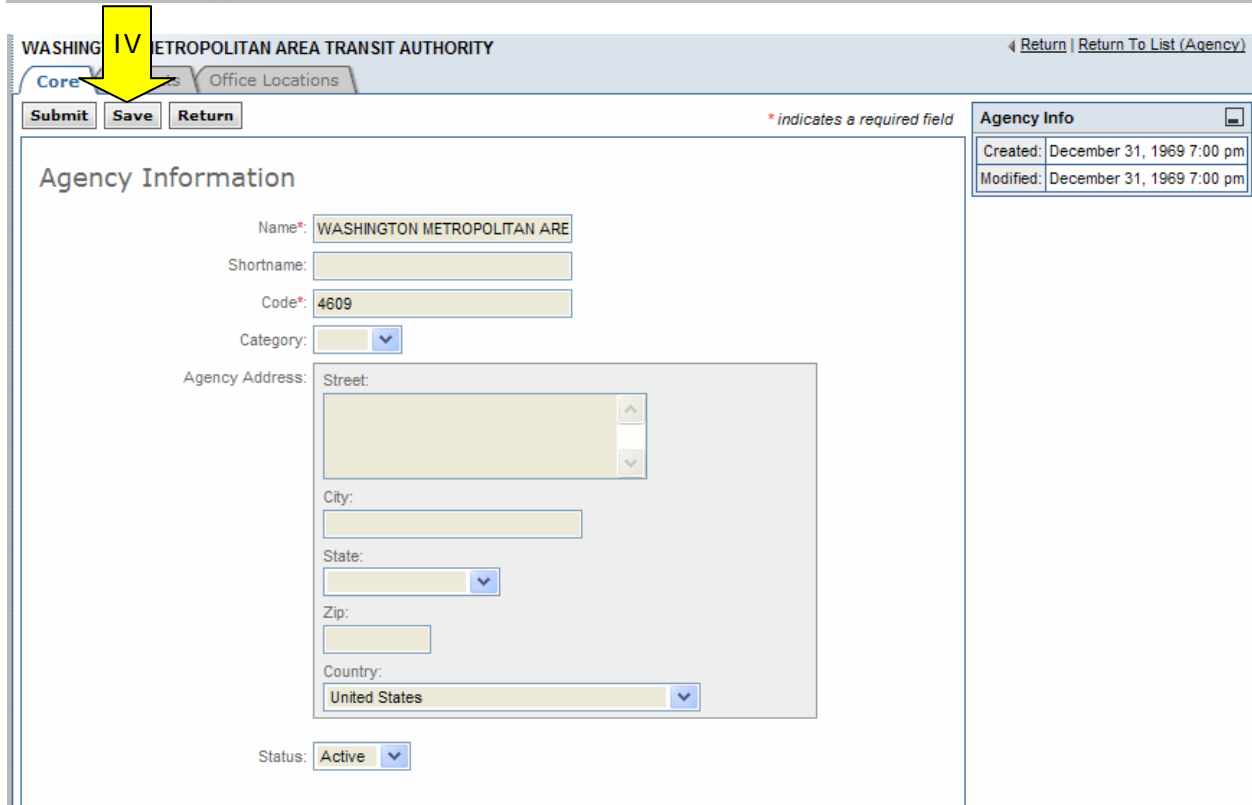
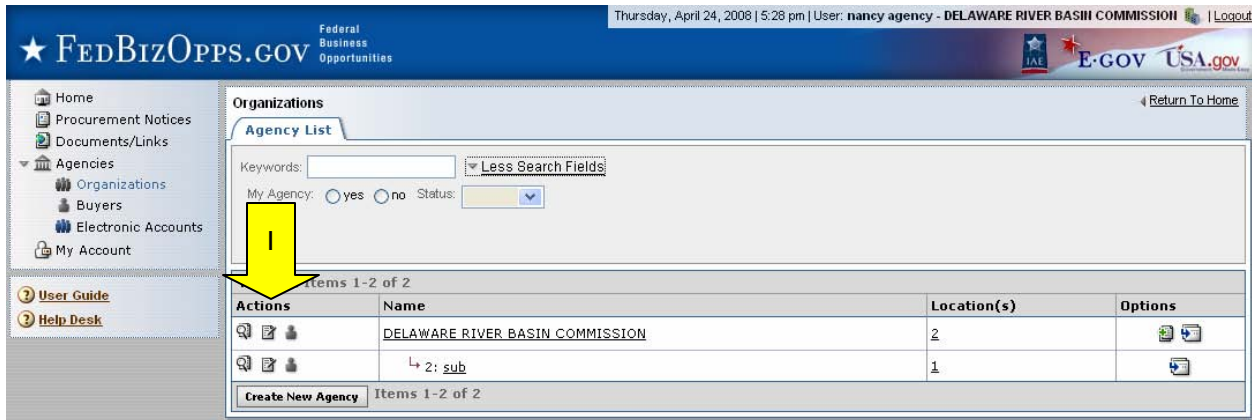
The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text 'Federal Business Opportunities', and the user's current session information: 'Thursday, April 24, 2008 | 5:28 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout'. The left sidebar contains a navigation menu with links for Home, Procurement Notices, Documents, Agencies, Organizations, Buyers, Electronic Accounts, and My Account. A yellow arrow points to the 'Organizations' link. Below the navigation menu are links for 'User Guide' and 'Help Desk'. The main content area is titled 'Organizations' and features an 'Agency List' search form with a 'Keywords' field, a 'Less Search Fields' dropdown, radio buttons for 'My Agency' (yes/no), and a 'Status' dropdown. A 'Go' button is located below the search form. The search results are displayed in a table with the following data:

Results: Items 1-2 of 2			
Actions	Name	Location(s)	Options
	<a href="#">DELAWARE RIVER BASIN COMMISSION</a>	2	
	↳ 2: <a href="#">sub</a>	1	


At the bottom of the results table, there is a 'Create New Agency' button and the text 'Items 1-2 of 2'. A 'Return To Home' link is located in the top right corner of the main content area.

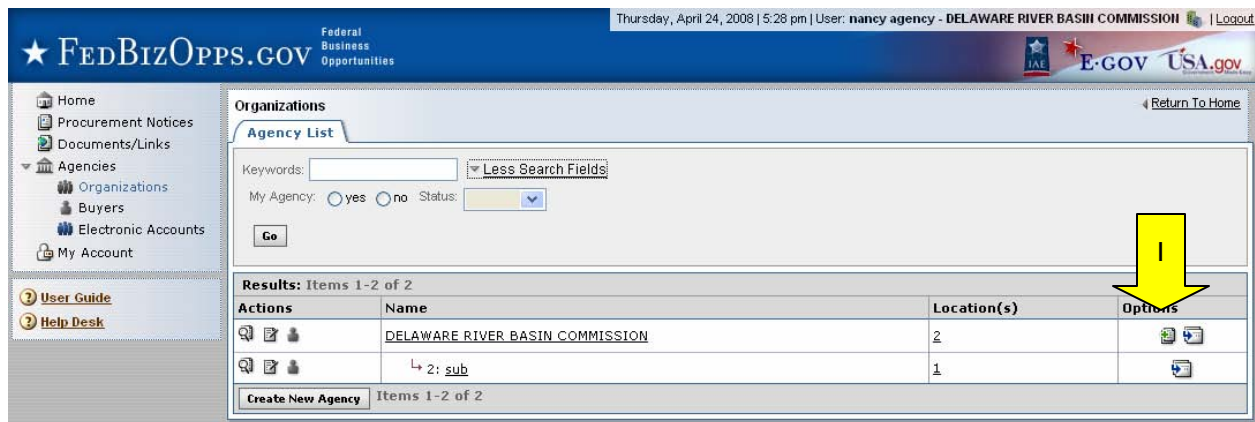
Edit Agency Record

- I. From the Agency List, use the “edit this item”  icon to edit the agency record.
- II. Doing so opens the record for edits. The “Core” agency data can then be updated.
- III. “Submit” enters the data for the record and submits the users changes (returns user to the previous list).
- IV. “Save” enters the data for the record and keeps the user in the record.
- V. “Return”, takes the user back to the prior screen without making any changes since the record was last saved.












## 7.1 Adding New Agency to Agency Hierarchy

- I. From the Agency List, the "Add Child Agency"  icon allows admin to add an agency as a sub-agency in the Agency's hierarchy.
- II. Using the "create new agency" button also allows the user to add to the agency's structure.



The screenshot shows the FEDBizOPPS.GOV interface. The top navigation bar includes the site logo, user information (Thursday, April 24, 2008 | 5:28 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION), and a Logout link. A left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies (with sub-links for Organizations, Buyers, Electronic Accounts, and My Account), User Guide, and Help Desk. The main content area is titled "Organizations" and contains an "Agency List" search form with fields for Keywords, My Agency (radio buttons for yes/no), and Status (dropdown), along with a "Go" button and a "Less Search Fields" link. Below the search form is a table with the following data:

Actions	Name	Location(s)	Options
  	DELAWARE RIVER BASIN COMMISSION	2	 
  	↳ 2: sub	1	

Below the table is a "Create New Agency" button and a note "Items 1-2 of 2". A yellow arrow points to the "Options" column of the table.



- I. If selected the user is prompted to complete the form to create a new agency in the system. Required fields are indicated by red asterisks.
- II. "Submit" enters the data for the record and submits the users entries (returns user to the previous list).
- III. "Save" enters the data for the record and keeps the user in the record.
- IV. "Return", takes the user back to the prior screen without making any changes since the record was last saved.
- V. The "Vendor View IVL (Interested Vendor List) List Default" and the "Vendor Add Themselves to IVL Default" fields allow the agency admin to establish agency defaults for their agency. Is set to force, buyers will not be able to deviate from the force value when they are entering a solicitation. If set to default, the setting will display with that selection when the buyer starts to enter the solicitation. They are able to change the value though as they enter the solicitation.
- VI. The "logo" field is where the admin can upload a logo image for the agency record in the system. Many graphic image formats are accepted, but EPS file types offer robust image quality in the system.

[new record]
Return | Return To List (agency)

Core
\* indicates a required field

Submit Save Return

### Agency Information

Parent Agency: DELAWARE RIVER BASIN COMMISSION

Name\*:

Shortname:

Code\*:

Category:

Agency Address:

Street:

City:

State:

Zip:

Country: United States

Vendor View IVL List Default:  Forced On  Forced Off  Default On  Default Off

Vendor Add Themselves To IVL List Default:  Forced On  Forced Off  Default On  Default Off

Status:


### Logo

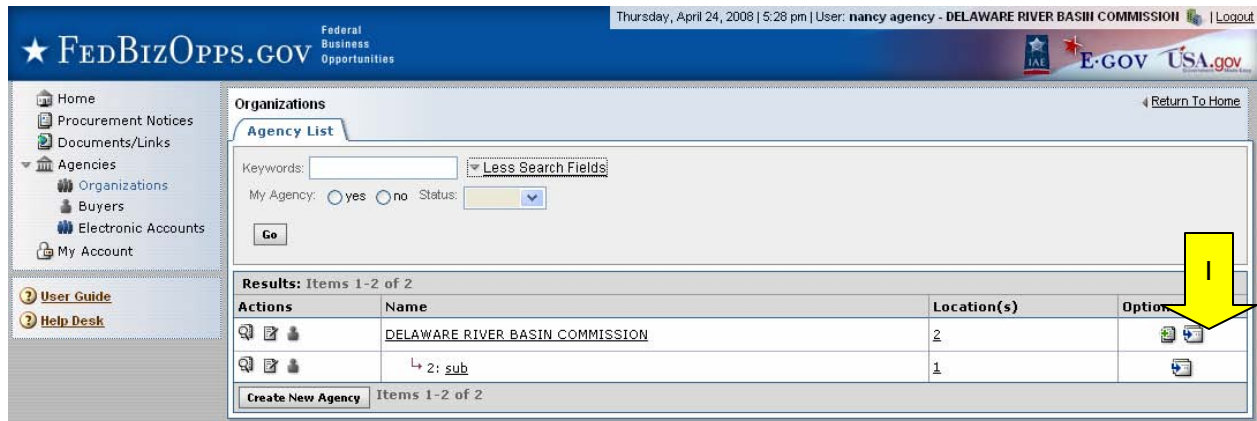
You may upload a logo for this agency/office

Logo: Upload:



## 7.2 Adding New Office Location to Agency

- I. From the Agency List, the “Add Office Location”  icon allows admin to add Office Location to an Agency as a sub-agency in that Agency’s hierarchy.



Thursday, April 24, 2008 | 5:28 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

FEDBIZOPPS.GOV Federal Business Opportunities

Home  
Procurement Notices  
Documents/Links  
Agencies  
Organizations  
Buyers  
Electronic Accounts  
My Account

User Guide  
Help Desk

**Organizations** Return To Home

**Agency List**

Keywords:  [Less Search Fields](#)

My Agency:  yes  no Status:

**Results:** Items 1-2 of 2

Actions	Name	Location(s)	Options
	DELAWARE RIVER BASIN COMMISSION	2	
	↳ 2: sub	1	

Items 1-2 of 2

- I. If selected the user is prompted to complete the form to create a new office location in the system. Required fields are indicated by red asterisks.
- II. "Submit" enters the data for the record and submits the users changes (returns user to the previous list).
- III. "Save" enters the data for the record and keeps the user in the record.
- IV. "Return", takes the user back to the prior screen without making any changes since the record was last saved.

Thursday, April 24, 2008 | 5:33 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

FEDBIZOPPS.GOV Federal Business Opportunities

E-GOV USA.gov

Home  
Procurement Notices  
Documents/Links  
Agencies  
Organizations  
Buyers  
Electronic Accounts  
My Account

User Guide  
Help Desk

[New Office] for DELAWARE RIVER BASIN COMMISSION

Core Contacts Offices Office Locations

Location Profile Contacts

Submit Save Return

\* indicates a required field

Office Information

Code\*:

Name\*:

Address\*:  
Street:

City:

State:

Zip:

Country:

Vendor View IVL List Default:  Forced On  Forced Off  Default On  Default Off

Vendor Add Themselves To IVL List Default:  Forced On  Forced Off  Default On  Default Off

Active:  yes  no

Submit Save Return

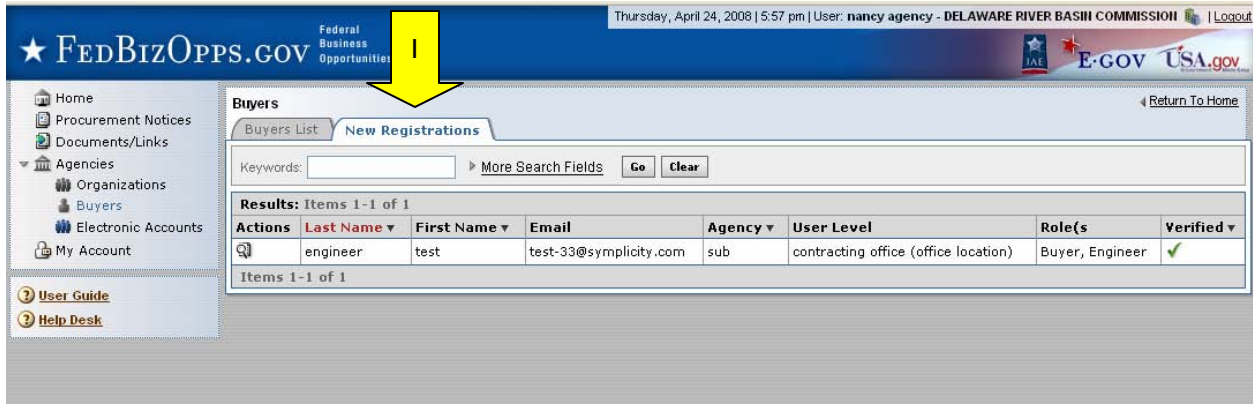
## 8 Manage Agency User Accounts

- Pending agency account requests that an location admin account is managing, will show on the "pending actions" section of the Home page for that account.

The screenshot displays the FEDBIZOPPS.GOV Home page. The top navigation bar includes the site logo, the text "Federal Business Opportunities", the date and time "Thursday, April 24, 2008 | 5:56 pm", the user information "User: nancy.agency - DELAWARE RIVER BASIN COMMISSION", and a "Logout" link. The left sidebar contains a menu with "Home", "Procurement Notices", "Documents/Links", "Agencies", "Organizations", "Buyers", "Electronic Accounts", and "My Account". Below the menu are links for "User Guide" and "Help Desk". The main content area is titled "Home" and features a "Pending Actions" section with a yellow arrow pointing to a list item: "1 Agency Contact Registrations". Other sections include "Quicklinks" with options like "Create Notice", "Mod/Amend Notice", "Create Award", "Cancel Notice", and "Upload New Documents/Links"; "Statistics" showing counts for "Active Procurement Notices", "Archived Procurement Notices", "Active Non-FBO Solicitations", "Archived Non-FBO Solicitations", "Active Document Packages", and "Agency Users"; an "Account Switcher" section with a dropdown menu set to "DELAWARE RIVER BASIN COMMISSION"; and an "Announcements" section stating "There are no announcements at this time."

## 8.1 Approving Email Verified New Registrations

- I. All registrants will receive an e-mail after submitting a registration form which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail (they have to verify their email address).
- II. When the "new registrations" list is opened, users will see a listing of pending registrations where the email has been verified.



Thursday, April 24, 2008 | 5:57 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

FEDBizOPPS.gov Federal Business Opportunities

Home  
Procurement Notices  
Documents/Links  
Agencies  
Organizations  
Buyers  
Electronic Accounts  
My Account

User Guide  
Help Desk

Buyers  
Buyers List | **New Registrations** | Return To Home

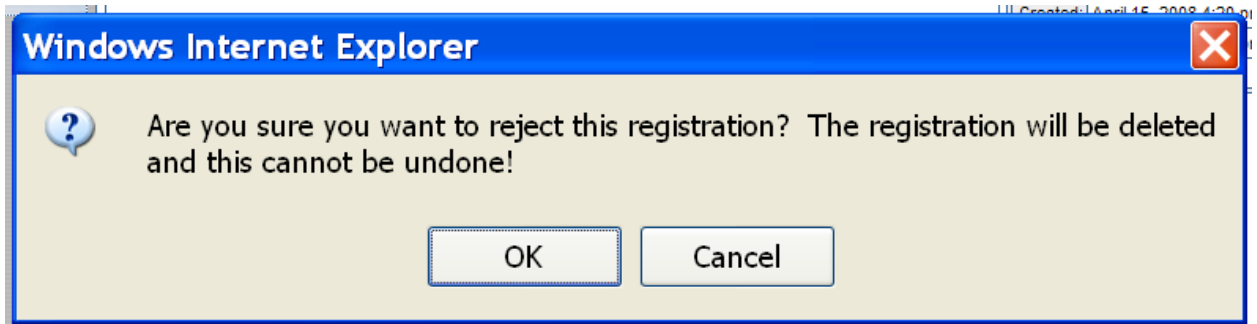
Keywords:  More Search Fields

Results: Items 1-1 of 1

Actions	Last Name	First Name	Email	Agency	User Level	Role(s)	Verified
	engineer	test	test-33@symplicity.com	sub	contracting office (office location)	Buyer, Engineer	<input checked="" type="checkbox"/>

Items 1-1 of 1

- I. When the registration record is opened, the user can “approve registration,” which allows the registrant to begin to use the system per their registration (e.g, as a buyer for that agency as shown on the form).
- II. “approved” registrants receive email notification when their account has been approved.
- III. If “reject” is selected, the user is asked to confirm that entry. The registration record is deleted when rejected. “Reject” cannot be undone. Users are asked to confirm this selection.



- IV. If “Return to List” is selected, the registration remains pending in the “new registrations” list and can be reviewed later. Leaves registration Pending.

The image shows a screenshot of a web application interface. On the left, there is a sidebar with "User Guide" and "Help Desk" links. The main content area is titled "Buyer User Registration Form" and contains the following information:

- Buttons: Approve Registration, Reject, Edit, Return To List
- Fullname: nancy engineer metro
- Title: test
- Email Address: nsp@oneagency.com
- Account Info:
  - Agency: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
  - User Level: agency
  - User Roles: Buyer
- Username: testnancy
- Buttons: Approve Registration, Reject, Edit, Return To List

On the right side, there is a table titled "Agency Registration Info":

Created:	April 15, 2008 4:20 pm
Modified:	April 15, 2008 4:24 pm
By:	Admin Test

- I. If edit is selected, the registrant's record is opened and a user can make edits to the record.
- II. Use "save changes" to save any edits to the registrant's record.

**Buyer User Registration Form**

Fullname\*: nancy engineer metro  
Suffix:   
Title: test  
Email Address\*: nsp@oneagency.com

Account Info: Agency\*: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY  
User Level\*:  agency  contracting office  
Other Contracting Office\*:   
User Roles\*:  Agency Administrator  Buyer  Engineer  Office Location Administrator

Username\*: testnancy

**Agency Registration Info**

Created:	April 15, 2008 4:20 pm
Modified:	April 15, 2008 4:24 pm
By:	Admin Test

**Save Changes** **Cancel Edits** **Cancel**

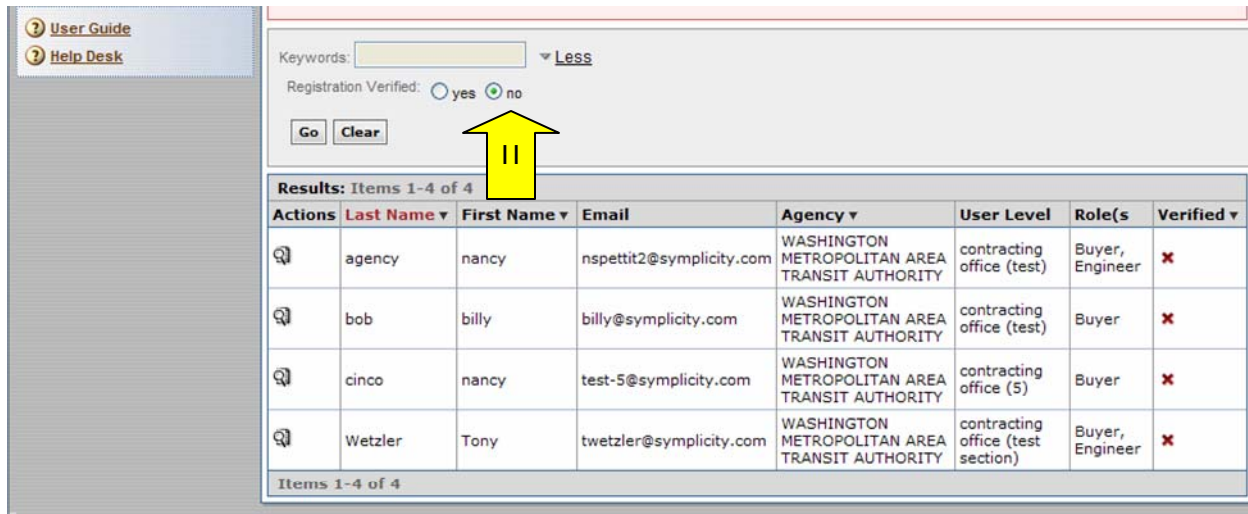
\* indicates a required field

**Save Changes** **Cancel Edits** **Cancel**



## 8.2 Approving Email Un-verified New Registrations

- I. If a registrant indicates that they have registered and their registration is not on the new registrations list, it is possible that the user has not “verified” their email address (required step after a user submits registration form).
- II. To review the list of “unverified” email registrations, use the “more” filter to show a list filter that will allow you to see “verified” “no”.
- III. Unverified email accounts are indicated by the red x in the verified column on the list.



The screenshot shows the 'Registration Verified' filter set to 'no'. Below the filter is a table with 4 items. A yellow arrow points to the 'no' radio button.

Actions	Last Name	First Name	Email	Agency	User Level	Role(s)	Verified
	agency	nancy	nspettit2@symplicity.com	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY	contracting office (test)	Buyer, Engineer	✘
	bob	billy	billy@symplicity.com	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY	contracting office (test)	Buyer	✘
	cinco	nancy	test-5@symplicity.com	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY	contracting office (5)	Buyer	✘
	Wetzler	Tony	twetzler@symplicity.com	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY	contracting office (test section)	Buyer, Engineer	✘

- IV. Users can still move forward with approving the “unverified” registration, but should ensure that the email is correct. System communication (including the notification of the approved account), will be sent to the email indicated on the registration form.
- V. Follow steps as described above for reviewing a “verified” registrant.

## 8.3 Create a Buyer Account

- I. To create a new user account, go to main navigation "Agencies", sub-navigation "Buyers".
- II. Use the "Create New Agency User" button to create a new agency user.
- III. See "Electronic Accounts" for information on creating email/ftp accounts in the system.
- IV. Select "next" to move forward in the record creation process.

Thursday, April 24, 2008 | 6:04 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

FEDBIZOPPS.GOV Federal Business Opportunities

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sub  
Core Contacts Office Locations  
Return | Return To List (agency)

Keywords:  More Search Fields Go

Batch Options Results: Items 1-2 of 2

Actions	Last Name	First Name	Office	Location(s)	Email	Phone	Username	Logins	Last login	Role(s)
<input type="checkbox"/>	agency	bill	DELAWARE RIVER BASIN COMMISSION/sub	office location	bill@agency.gov		bills	0	-	Buyer
<input type="checkbox"/>	registrant	new	DELAWARE RIVER BASIN COMMISSION/sub	office location	test44@us.gov		test4455	0	-	Buyer, Engineer

Create New Agency User Items 1-2 of 2

- I. The "New Agency User" form is opened and the user can enter the "core" details for the new record.
- II. Because this new account was entered from Buyer's list, the account is set to be "no" for "Electronic Submission Account." Electron submission accounts can only use electronic submission (FTP/email) methods to submit materials to the system.
- III. Select "next" to move forward in the record creation process.

Thursday, April 24, 2008 | 6:00 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

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**[New Agency User]** [Return To Agency](#) | [Return To List \(agency\\_contact\)](#)

Note: Please enter in the contact information and click [next] to proceed to the next step

Next Return \* indicates a required field

### Agency User Information

Title:

Full Name\*:

First Name:

Middle Name:

Last Name:

Suffix:

Email\*:

Phone:

Cell Phone:

Fax:

Electronic Submission Account: Set this to "yes" if this account is only used for electronic submissions (ftp or email). Note, setting to "yes" will make this user only show up in the Electronic Accounts section.

no

Next Return

- I. The next step, the user established the "Account" for the new user.
- II. "Cancel" can be used to quit the process without saving the new record.
- III. Select "next" to move forward in the record creation process.

Tuesday, April 15, 2008 | 9:53 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

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[New User Account For nan murray] [Return](#) [Return To List \(Account\)](#)

Core Accounts Username/Password Login As

**Note:**  
Please choose the agency, office location and user role(s) for this account and click [next].

Next Cancel \* indicates a required field

Agency\*: Sample Agency in FBO Test

User Level\*: Choose "agency" for agency administrators or for users that will manage data across offices/locations from their agency and below  
 agency  contracting office

Contracting Office Location\*: [dropdown]

User Roles\*:  Agency Administrator  Buyer  Engineer  Office Location Administrator

Next Cancel

- IV. The next step, the user established the "Username/Password" for the new user.
- V. Select "save" to save the new user in the system.
- VI. "Return" quits the process without saving the new record.

Tuesday, April 15, 2008 | 9:54 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

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nan murray: Account [Return](#) [Return To List \(Agency Contact\)](#)

Core Accounts Username/Password Login As

**Note:**  
Please choose a username and password for this account and click [save] to complete the new user record

Save Return \* indicates a required field

Buyers Info  
Created: April 15, 2008 9:53 pm  
By: nancy agency  
Modified: April 15, 2008 9:53 pm  
By: nancy agency

Account Information

Disable Account:  yes  no

Username\*: [input field]

Enter New Password: [input field]

Verify Password: [input field]

Save Return

## 8.4 Electronic Accounts

- I. Users that are set up for "Electronic Accounts" will only be able to submit materials to the FBO system via "email" or "FTP" (electronic methods).
- II. To add a new user with this sort of functionality, go to the main navigation, "Agencies" and the sub-tab "Electronic Accounts". Use the "Create New Electronic Account" button to enter a new user.
- III. Doing so opens a new agency form, with the setting for "electronic account" set to "yes".
- IV. Enter required fields and select "next."

Thursday, April 24, 2008 | 6:17 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

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**Electronic Accounts** [Return](#)

**Electronic Submission Accounts**

Keywords:  [More Search Fields](#)

Batch Options **Results:** Items 1-1 of 1

Actions	Last Name	First Name	Agency/Office	Location(s)	Email	Phone	Username
<input type="checkbox"/>	electronic	nancy	DELAWARE RIVER BASIN COMMISSION	office	test-55@symplicity.com		testelectro

[Return](#)

Thursday, April 24, 2008 | 6:19 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

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**[New Agency User]** [Return](#) [Return To List \(electronic\)](#)

**Core**

**Note:**  
Please enter in the contact information and click [next] to proceed to the next step

\* indicates a required field

**Agency User Information**

Title:

Full Name\*:

First Name:

Middle Name:

Last Name:

Suffix:

Email\*:

Phone:

Cell Phone:

Fax:

Electronic Submission Account:  Set this to "yes" if this account is only used for electronic submissions (ftp or email). Note, setting to "yes" will make this user only show up in the [Agency Accounts](#) section.

- I. Users should then complete the account agency / office / user rights for the new user per presented forms.

- II. Once the username is entered, and saved, the account will then appear on the electronic accounts list.

- III. Note: Users cannot "register" to request this type of account in the system. The "electronic account" option is not presented to buyers/engineers during the registration process.

## 8.5 Batch Email Users

- I. From the Buyers / Electronic Accounts list of accounts, the user can send an email via the system to all or select members of the list.
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the distribution list of the email being sent. "-" will unselect all in the list.
- III. If not intended for all, use the checkmark to select specific recipients.
- IV. Once selections have been made, select the "batch options" tool, and the "mail", and "new message" options.
- V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the "-" tool to unselect all if you wish to do another batch operation that targets a different list of users.

Tuesday, April 15, 2008 | 9:55 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

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**Buyers**  
 Buyers List | New Registrations

Keywords:  [More](#) [Go](#)

Batch Options **Results: Items 1-6 of 6 (6 items selected)**

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
<input checked="" type="checkbox"/>	admin	User	Sample Agency in FBO Test		<a href="mailto:user@fatp.gov">user@fatp.gov</a>		agency	0
<input checked="" type="checkbox"/>	agency	nancy	Sample Agency in FBO Test		<a href="mailto:test-3@symplicity.com">test-3@symplicity.com</a>		nancyagency	23
<input checked="" type="checkbox"/>	Buyer	Billy	Sample Agency in FBO Test		<a href="mailto:Billy@saft.gov">Billy@saft.gov</a>		billybuyer	0
<input checked="" type="checkbox"/>	Engineer	Suzie	Sample Agency in FBO Test		<a href="mailto:Suzie@SAFT.gov">Suzie@SAFT.gov</a>		suzie	0
<input checked="" type="checkbox"/>	murray	nan	Sample Agency in FBO Test		<a href="mailto:nan@gov.agency.com">nan@gov.agency.com</a>			0
<input checked="" type="checkbox"/>	Warehouse	Dudley	Subordinate Agency	technocrat	<a href="mailto:Dudley@saft.warehouse.gov">Dudley@saft.warehouse.gov</a>		dudley	0

[Create New Agency User](#) | Items 1-6 of 6

Tuesday, April 15, 2008 | 9:55 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

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**Buyers**  
 Buyers List | New Registrations

Keywords:  [More](#) [Go](#)

Batch Options **Results: Items 1-6 of 6 (6 items selected)**

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
<input checked="" type="checkbox"/>	admin	User	Sample Agency in FBO Test		<a href="mailto:user@fatp.gov">user@fatp.gov</a>		agency	0

[new message]

- I. Once "new message" is selected, a "mail wizard" opens which allows the user to compose a message.
- II. Use message options to save the message for future use.
- III. Available mail merge fields are shown in the list of "available fields"
- IV. At the bottom of the page (not pictured), attachments can be added to the message.
- V. Hit "next" to go to the next step in the process.
- VI. "Cancel" cancels the operation. Note, batch selections are not cleared with cancel.

Tuesday, April 15, 2008 | 9:57 pm | User: nancy agency - Sample Agency in FBO Test [Switch Account](#) | [Logout](#)

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Users List | New Registrations | **Mail Wizard** | [Return](#)

**Review/Edit Message**

Review/set the parameters of the message you wish to send. Make any changes in the form below, select whether and how you wish to save these changes, and then select the 'next' button.

**Message Options**  Do Not Save  Save as New

Message Identifier: Please enter an identifier for this message

Subject: Enter the subject of the email message.

From\*: Please enter the e-mail address which will be used in the from field.

Cc: Address(es) who should be carbon copied

Bcc: Address(es) who should be blind copied

Send Copy To: Address(es) to receive a copy of the first message sent

HTML Format: Do you wish to format this message using HTML?  
 yes  no

Message Body\*: Please enter the message body, including any substitution fields

**AVAILABLE FIELDS**

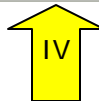
[title]  
 [fullname]  
 [email]  
 [phone]  
 [fax]  
 [cell\_phone]  
 [modified]  
 [created]  
 [username]  
 [password]  
 [date]  
 [tab]  
 [system\_uri]

**Please note:** Use of the [password] field will result in the login password being reset and a new password generated for all contacts receiving this email.



- I. Next the user will be given a chance to review the list of recipients for the message.
- II. "Prev" returns the user to the message composition step of the process.
- III. "Cancel" cancels the operation. Note, batch selections are not cleared with cancel.
- IV. "Send Message" sends the message to the users.

The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text 'Federal Business Opportunities', and the user information: 'Tuesday, April 15, 2008 | 9:58 pm | User: nancy agency - Sample Agency in FBO Test | Switch Account | Logout'. The main content area is titled 'Mail Wizard' and is currently on 'STEP 2: Review Recipients'. The instruction reads: 'Please review the list of recipients below, and make any desired changes.' A list of email addresses is displayed in a text box: Dudley@saft.warehouse.gov, test-3@symplicity.com, Billy@saft.gov, nan@gov.agency.com, Suzie@SAFT.gov, and user@fatp.gov. Below the list is a button labeled 'remove selected recipients'. A red warning message states: 'WARNING: When you click 'Send Messages', the mailing will begin. This is your last chance to change your mind or make any corrections.' At the bottom of the wizard are three buttons: 'cancel', '< prev', and 'Send Messages'.



## 8.6 Batch "Save to Excel"

- I. From the Buyers or Electronic Accounts list of accounts, the user can save a list of all, or select members, of the list to excel format.
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the excel list. "-" will unselect all in the list.
- III. If not wanting to include all in the file, use the checkmark to select specific recipients.
- IV. Once selections have been made, select the "batch options" tool, and the "save as excel", and either "this page" or "selected records" options.
- V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the "-" tool to unselect all if you wish to do another batch operation that targets a different list of users.

Batch Options Results: Items 1-6 of 6 (6 items selected)

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
+	admin	user	Sample Agency in FBO Test		user@fatp.gov		agency	0
+	agency	nancy	Sample Agency in FBO Test		test-3@symplicity.com		nancyagency	23
✓	Buyer	Billy	Sample Agency in FBO Test		Billy@saft.gov		billybuyer	0
✓	Engineer	Suzie	Sample Agency in FBO Test		Suzie@SAFT.gov		suzie	0
✓	murray	nan	Sample Agency in FBO Test		nan@gov.agency.com			0
✓	Warehouse	Dudley	Subordinate Agency	technocrat	Dudley@saft.warehouse.gov		dudley	0

Create New Agency User Items 1-6 of 6

Batch Options Results: Items 1-6 of 6

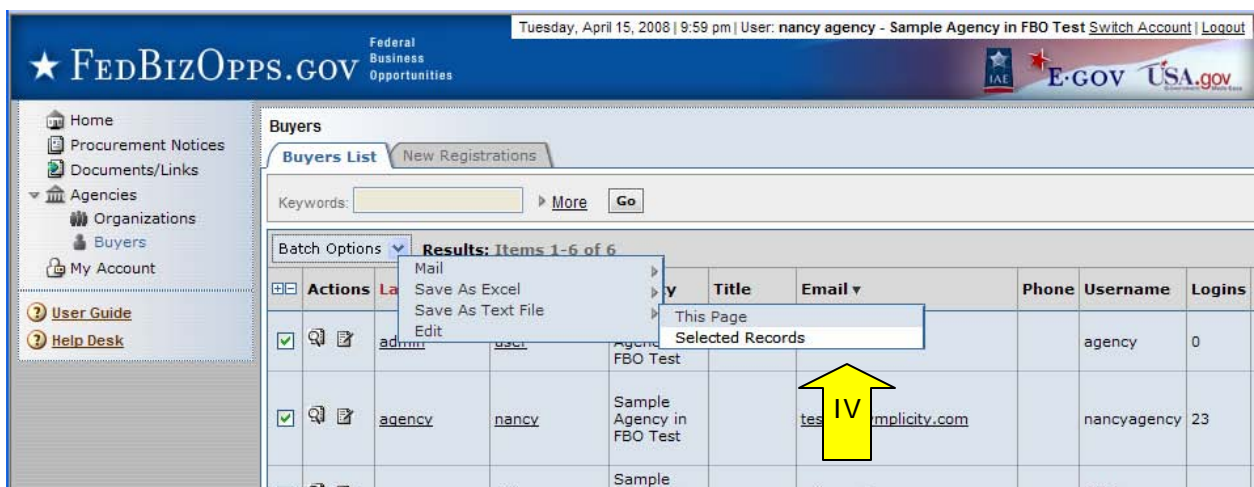
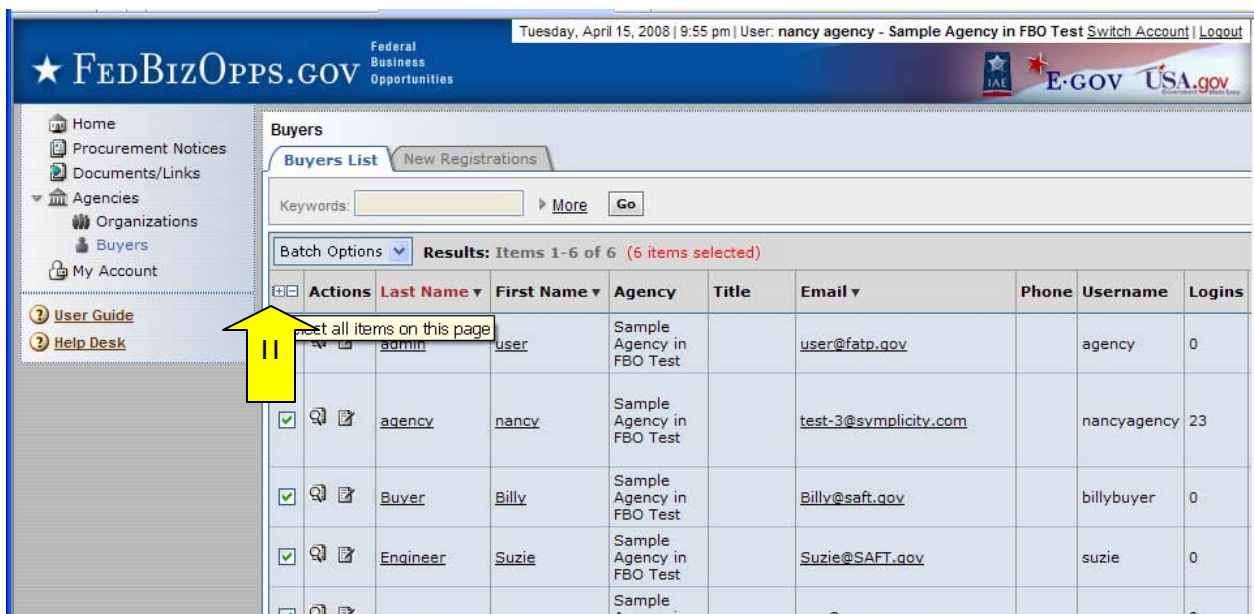
Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
+	admin	user	Agency in FBO Test		@fatp.gov		agency	0
+	agency	nancy	Sample Agency in FBO Test		-3@symplicity.com		nancyagency	23

- IV. Follow your browser prompts to open or save as excel file.
- V. System will create excel file with select fields for the buyer accounts selected.

	A	B	C	D	E	F	G	H	I	J	K	L
	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins	Last Login	Role(s)		
2	admin	user	Sample A		user@f		agency	0		Agency Administrator		
3	agency	nancy	Sample A		test-3@		nancyagenc	23	2008-04-15 21:	Agency Administrator		
4	Buyer	Billy	Sample A		Billy@s		billybuyer	0		Buyer		
5	Engineer	Suzie	Sample A		Suzie@		suzie	0		Engineer		
6	murray	nan	Sample A		nan@gc			0		Buyer		
7	Warehouser	Dudley	Subordin	technoc	Dudley@		dudley	0		Engineer		
8												
9												
10												

## 8.7 Batch "Save to Text File"

- I. From the Buyers or Electronic Accounts list of accounts, the user can save a list of all, or select members of the list, to text file format.
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the text file list. "-" will unselect all in the list.
- III. If not wanting to include all in the file, use the checkmark to select specific recipients.
- IV. Once selections have been made, select the "batch options" tool, and the "save as test file", and either "this page" or "selected records" options.
- V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the "-" tool to unselect all if you wish to do another batch operation that targets a different list of users.



- VI. Follow your browser prompts to open or save the text file.
- VII. System will create text file with select fields for the buyer accounts selected.

## 8.8 Batch Edit "Roles"

- I. From the Buyers or Electronic List of accounts, the user can edit user "roles".
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the role edit. "-" will unselect all in the list.
- III. If not all are to be edited, use the checkmark to select specific users.
- IV. Once selections have been made, select the "batch options" tool, and the "edit" option.
- V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the "-" tool to unselect all if you wish to do another batch operation that targets a different list of users.

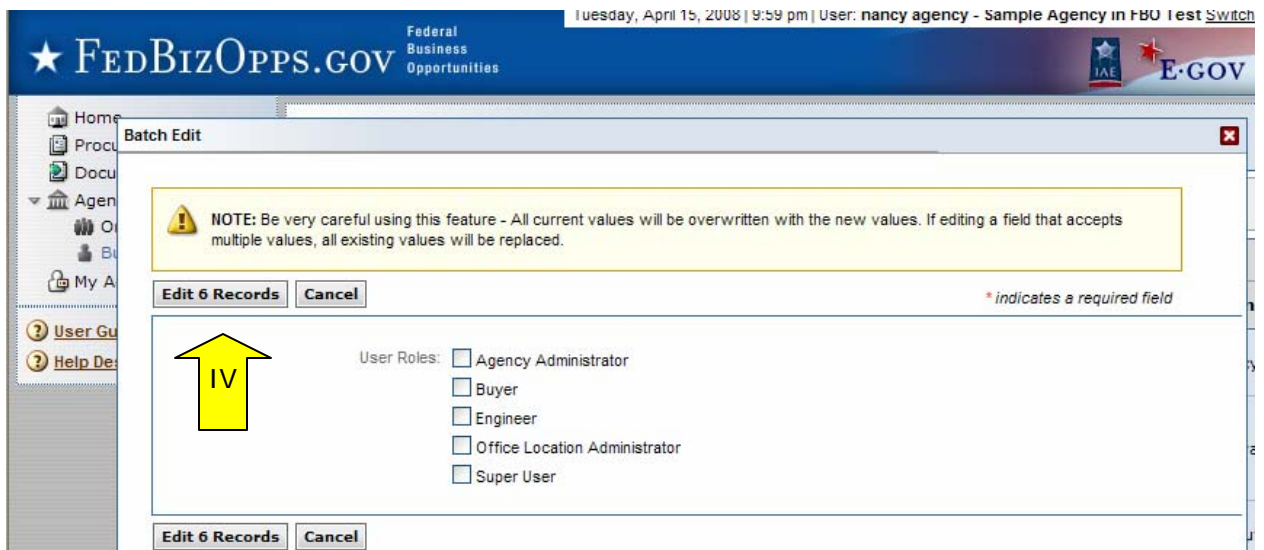
The screenshot shows the 'Buyers List' page on FEDBIZOPPS.GOV. The page header includes the date 'Tuesday, April 15, 2008 | 9:55 pm' and the user 'nancy agency - Sample Agency in FBO Test'. The left sidebar contains navigation links like 'Home', 'Procurement Notices', and 'Agencies'. The main content area shows a table of users with columns for 'Actions', 'Last Name', 'First Name', 'Agency', 'Title', 'Email', 'Phone', 'Username', and 'Logins'. A yellow arrow points to the selection tool in the 'Actions' column, which is currently set to 'select all items on this page'. The table contains six rows of user data.

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
[+]	admin	user	Sample Agency in FBO Test		user@fatp.gov		agency	0
[+]	agency	nancy	Sample Agency in FBO Test		test-3@symplicity.com		nancyagency	23
[+]	Buyer	Billy	Sample Agency in FBO Test		Billy@saft.gov		billybuyer	0
[+]	Engineer	Suzie	Sample Agency in FBO Test		Suzie@SAFT.gov		suzie	0
[+]			Sample Agency in FBO Test					

This screenshot shows the same 'Buyers List' page, but with the 'Batch Options' menu open. A yellow arrow points to the 'Edit' option in the menu. The table now shows seven rows of user data. The 'Batch Options' menu includes options like 'Mail', 'Save As Excel', 'Save As Text File', and 'Edit'.

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
[+]	admin	user	Agency in FBO Test		user@fatp.gov		agency	0
[+]	agency	nancy	Sample Agency in FBO Test		test-3@symplicity.com		nancyagency	23
[+]	Buyer	Billy	Sample Agency in FBO Test		Billy@saft.gov		billybuyer	0
[+]	Engineer	Suzie	Sample Agency in FBO Test		Suzie@SAFT.gov		suzie	0
[+]	murray	nan	Sample Agency in FBO Test		nan@gov.agency.com			0
[+]	Warehouse	Dudley	Subordinate Agency	technocrat	Dudley@saft.warehouse.gov		dudley	0

- I. This opens a pop-up window, where the manager can make set the roles for the users.
- II. If adding only one role to the selected accounts, if the user previously had other roles, these roles will be removed and only the values being assigned at this time will remain. So You will want to use the tool with care (as indicated by warning message).
- III. "Cancel" cancels the operation. Note, batch selections are not cleared with cancel.
- IV. "Edit X Records" updates the number of users that were selected (so if ten users accounts were selected, the button would read "edit 10 Records").



## 8.9 Disabling an Account

- I. Click on the edit icon to disable an account. Disabled accounts are not deleted from the system, but users cannot access the system if they are disabled.
- II. If edit is selected, the registrant's record is opened and a user can make edits to the record.

The screenshot shows the 'Buyers List' page on FEDBIZOPPS.GOV. The page header includes the date 'Tuesday, April 15, 2008 | 9:59 pm' and the user 'nancy agency - Sample Agency in FBO Test'. The left sidebar contains navigation links like 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account'. The main content area shows a table of buyers with columns for Actions, Last Name, First Name, Agency, Title, Email, Phone, Username, and Logins. A yellow arrow points to the edit icon in the 'Actions' column for the user 'agency'.

Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
<input type="checkbox"/>	admin	user	Sample Agency in FBO Test		user@fatp.gov		agency	0
<input type="checkbox"/>	agency	nancy	Sample Agency in FBO Test		test-3@symplicity.com		nancyagency	23
<input type="checkbox"/>	Buyer	Billy	Sample Agency in FBO Test		Billy@saft.gov		billybuyer	0
<input type="checkbox"/>	Engineer	Suzie	Sample Agency in FBO Test		Suzie@SAFT.gov		suzie	0
<input type="checkbox"/>	murray	nan	Sample Agency in FBO Test		nan@gov.agency.com			0
<input type="checkbox"/>	Warehouse	Dudley	Subordinate Agency	technocrat	Dudlev@saft.warehouse.gov		dudley	0

- III. Go to the Username / Password tab and change the field "disabled account" from "no" to "yes" to disable the account.
- IV. Select "save" to save the disabled status for the user in the system.
- V. "Return" quits the process without saving changes to the record.

The screenshot shows the 'user agency admin: Account' page on FEDBIZOPPS.GOV. The page header includes the date 'Tuesday, April 15, 2008 | 10:07 pm' and the user 'nancy agency - Sample Agency in FBO Test'. The left sidebar contains navigation links like 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account'. The main content area shows the 'Account Information' form with fields for 'Disable Account', 'Username', 'Enter New Password', and 'Verify Password'. A yellow arrow points to the 'Save' button.

Disable Account:  yes  no

Username\*:

Enter New Password:


Verify Password:

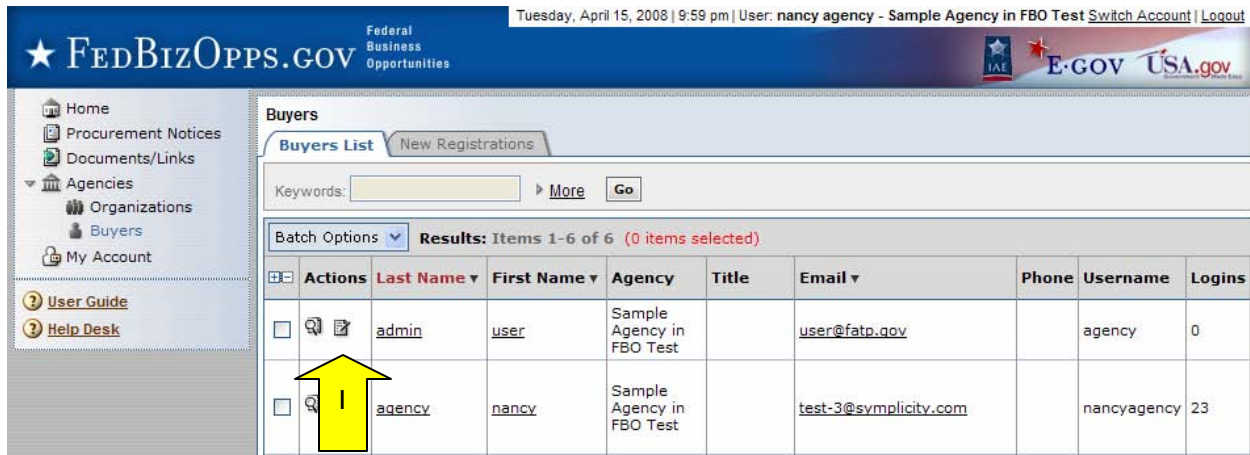
Save Return

Buyers Info

Created:	April 15, 2008 12:42 pm
By:	nancy agency
Modified:	April 15, 2008 12:42 pm
By:	nancy agency

## 8.10 Delete an Account

- I. Click on the edit icon  to delete an account.
- II. If edit is selected, the registrant's record is opened and a user can make edits to the record.







Buyers

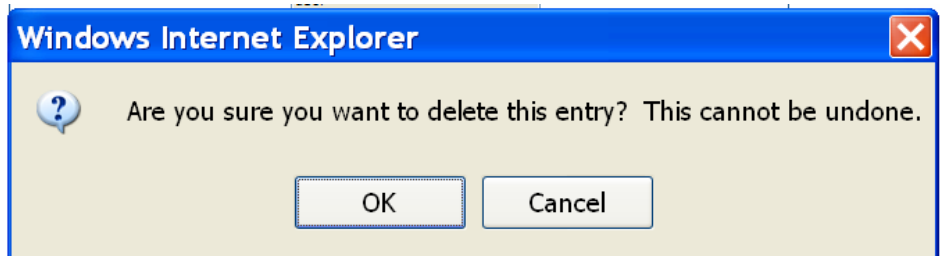
Buyers List | New Registrations

Keywords:  [More](#)

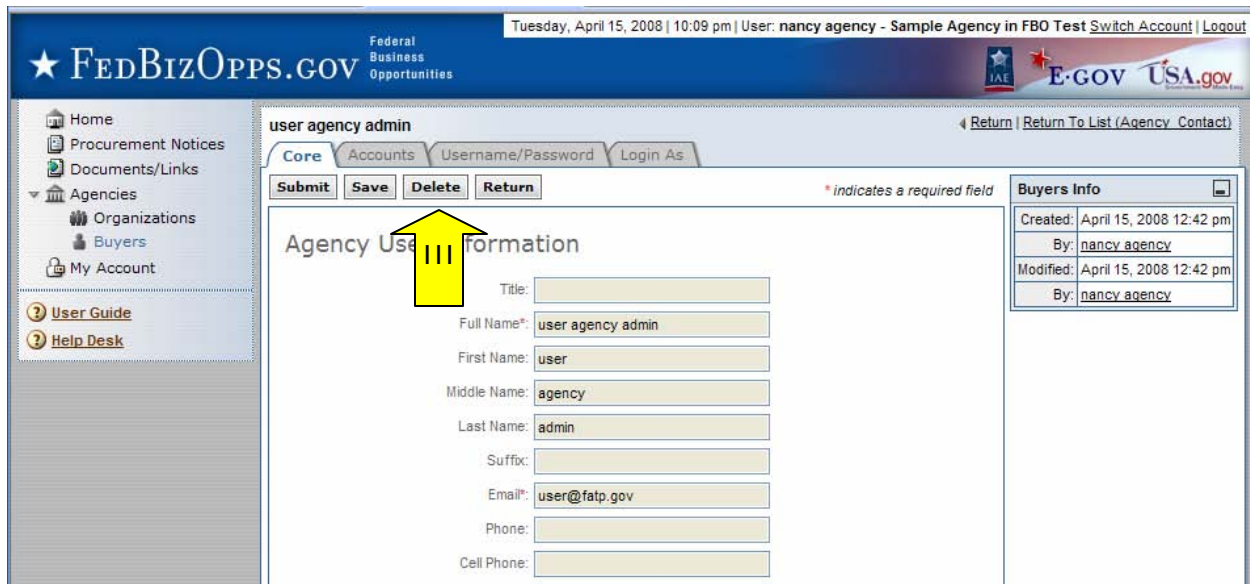
Batch Options  Results: Items 1-6 of 6 (0 items selected)

<input type="checkbox"/>	Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
<input type="checkbox"/>	 	admin	user	Sample Agency in FBO Test		user@fatp.gov		agency	0
<input type="checkbox"/>	 	agency	nancy	Sample Agency in FBO Test		test-3@symplicity.com		nancyagency	23

- VI. Select "delete" to delete user in the system. Because the action is immediate and permanent, the user is prompted to confirm the selection.



- Value: VII. "Return" quits the process without saving any changes to the record.



user agency admin

Core | Accounts | Username/Password | Login As

Agency User Information

Title:

Full Name\*: user agency admin

First Name: user

Middle Name: agency

Last Name: admin

Suffix:

Email\*: user@fatp.gov

Phone:

Cell Phone:

Buyers Info

Created: April 15, 2008 12:42 pm  
By: nancy agency  
Modified: April 15, 2008 12:42 pm  
By: nancy agency