



FBO.GOV Location Admin 1.8

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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:


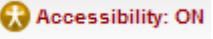

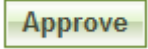
- **DUNS (Data Universal Number System) Number**
 - **Commercial and Government Entity (CAGE) Code**
 - **MPIN (Marketing Partner Identification Number)** – Optional profile field required to view sensitive materials.
- Vendor Opportunity Review Features: Vendor can search for opportunities based on 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)


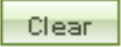



Vendor can set up “search agents” based on detailed search elements, which highlight newly added opportunities which align with their search criteria. Vendor can add opportunities to a “watch list” list (akin to a “favorites” list”). Per the vendor’s profile status, vendor can review documents associated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


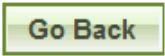






- Opportunity Actions: Vendor is able to add themselves to the “interested vendors list” for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors can 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.



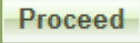
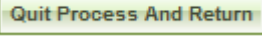

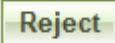




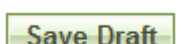
1.1 Definition of key terms



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 agencies/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.
Bids	n/a	If enabled by the admin and buyer, this feature allows for the electronic submission and evaluation of vendor responses to notices.
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.
CLIN	n/a	Buyers may enable an online Item (CLIN) builder which will serve as a template for the items that vendors will be requested to quote on; buyers may utilize the Item (CLIN) Builder in conjunction with requesting electronic submission of proposals as well.
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"
Doc Package	n/a	If enabled by the buyer, vendors can submit an electronic response to notices in the form of document (file) uploads.
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.
Electronic Submissions	n/a	If the Bid Module is enabled by the Admin and Buyer, vendors can submit electronic responses to notices called Electronic Submissions which can be a CLIN form and/or a doc package.
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
- Privacy

Five yellow arrows labeled I through V point to these navigation items. The main content area features a large eagle graphic on the left and a central banner that reads:

Welcome to FBO.gov, the U.S Government's one-stop virtual marketplace. Through this single point-of-entry, commercial vendors and government buyers are invited to post, search, monitor, and retrieve opportunities solicited by the entire Federal contracting community.

Below the banner is a large green arrow pointing right with the text: **Find Opportunities** NO REGISTRATION REQUIRED **Start researching now >**

On the right side of the page, there is a 'QUICK SEARCH' section with a search box and a 'Go' button. Below that is a 'USER GUIDES' section with links for Buyer, Vendor, Engineer, and Location / Agency Admin. At the bottom right, there is an 'ADDITIONAL RESOURCES' section with links for Business Partner Network (BPN), Central Contractor Registration (CCR), Online Regs & Cert Application (ORCA), Federal Agency Business Forecasts, and Federal Assets Sales.

At the bottom of the page, there are two sections for user login:

- Buyers / Engineers:** Post, manage, and award opportunities. Includes a login form with fields for Username and Password, and a 'View Opportunities' button. A note states: 'No login is required to view opportunities.'
- Vendors:** Search, monitor, and retrieve opportunities. Includes a login form with fields for Username and Password, and a 'Find Opportunities' button. A note states: 'No login is required to view opportunities.'

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 and click on the Buyers / Engineers' "Register" link. This will open up a series of screens where the user enters registration data.

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the header includes the site name and logos for Federal Business Opportunities, IAE, E-GOV, and USA.gov. A navigation menu contains links for Home, General Info, News, Opportunities, Agencies, and Privacy. The main content area features a large eagle graphic and a central banner that reads "Welcome to FBO.gov, the U.S Government's one-stop virtual marketplace. Through this single point-of-entry, commercial vendors and government buyers are invited to post, search, monitor, and retrieve opportunities solicited by the entire Federal contracting community." Below this banner is a "Find Opportunities" section with the text "NO REGISTRATION REQUIRED" and a "Start researching now" link. To the right, there is a "QUICK SEARCH" box with a "Go" button and a link to "Advanced Search". Below the search box is a "USER GUIDES" section with links for Buyer, Vendor, Engineer, and Location / Agency Admin. Further down is an "ADDITIONAL RESOURCES" section with various links. On the left side, there are two registration forms: one for "Buyers / Engineers" and one for "Vendors". Both forms include fields for Username and Password, and a "Login" button. The "Buyers / Engineers" form has links for "View Opportunities", "Register Now", and "Password Reminder". The "Vendors" form has links for "Find Opportunities", "Register Now", and "Password Reminder". A yellow arrow labeled "I" points to the "Register Now" link in the Buyers / Engineers form.

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

Federal Business Opportunities

Home General Info News Opportunities Agencies Privacy

Buyer/Engineer Registration

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

II

- 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:
nanoy

Your Suffix:
n

The Title of Your Position:
n

Your Email Address:
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:

Go Back
Cancel
Submit



II



III

- 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



- 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. At the top, there is a navigation bar with links for Home, General Info, News, Opportunities, Agencies, and Privacy. Below the navigation bar is a main content area with a large banner for "Find Opportunities" and a "Start researching now" button. To the right of the banner is a "QUICK SEARCH" box and a "Go" button. Below the search box are sections for "USER GUIDES" and "ADDITIONAL RESOURCES".

On the left side of the main content area, there are two login sections:

- Buyers / Engineers:** This section has a "Username" field, a "Password" field, and a "Login" button. A yellow arrow labeled "II" points to the "Username" field. Below the fields are links for "Register Now" and "Password Reminder".
- Vendors:** This section has a "Username" field, a "Password" field, and a "Login" button. Below the fields are links for "Find Opportunities", "Register Now", and "Password Reminder".
- Location / Agency Administrators:** This section is located below the other two and has a "Login Here" link and a "Register Now" link. A yellow arrow labeled "I" points to the "Login Here" link.

- 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 displayed as 'Tuesday, April 15, 2008 | 3:09 pm'. The page features a 'Login' tab and a 'Forgot My Password' tab. The login form contains fields for 'Username' and 'Password', a checkbox for 'Keep me logged in on this computer', and 'Go' and 'Reset' buttons. At the bottom of the form, there are links for 'FBO Home page' and 'Help Desk'. Yellow arrows with labels III, IV, and VI point to the 'Go' button, the 'Forgot My Password' tab, and the 'Help Desk' link, respectively.

Admin Login

Username:

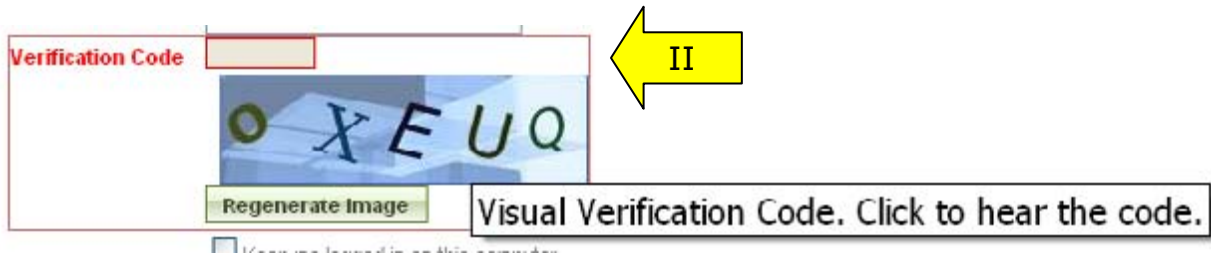
Password:

Keep me logged in on this computer

[FBO Home page](#) | [Help Desk](#)

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 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.

- II • 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," "Stats" 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. The top navigation bar includes the site logo, the text "Federal Business Opportunities", and the date and time "Tuesday, May 20, 2008 | 12:47 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout". The left sidebar contains a main navigation menu with the following items: Home, Procurement Notices, Documents/Links, Agencies (highlighted with a yellow arrow labeled 'I'), Organizations, Buyers, Electronic Accounts, Stats, and My Account. Below the main menu are links for "User Guide" and "Help Desk". The main content area is titled "Home" and contains several sections: "Video Demonstrations" with a "NEW" badge and a note about the Adobe Flash plugin; "Managing Buyers & Locations"; "Pending Actions" showing 0 "Explicit Access Requests" and 1 "Agency Contact Registrations"; "Quicklinks" including "Create Notice", "Mod/Amend Notice", "Create Award", "Cancel Notice", and "Upload New Documents/Links"; "Statistics" showing 1 "Active Procurement Notices", 0 "Archived Procurement Notices", 0 "Active Non-FBO Solicitations", 1 "Archived Non-FBO Solicitations", 0 "Active Document Packages", and 9 "Agency Users"; "Account Switcher" with a dropdown menu set to "DELAWARE RIVER BASIN COMMISSION" and a tip to click the globe icon; and "Announcements" stating "There are no announcements at this time."

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", the date and time "Tuesday, May 20, 2008 | 12:47 pm", the user information "User: nancy agency - DELAWARE RIVER BASIN COMMISSION", and a "Logout" link. The main navigation menu on the left includes "Home", "Procurement Notices", "Documents/Links", "Agencies" (with sub-items: Organizations, Buyers, Electronic Accounts), "Stats", "My Account", "User Guide", and "Help Desk". The main content area is titled "Home" and contains several sections: "Video Demonstrations" (with a "NEW" badge and a message about the Adobe Flash plugin), "Managing Buyers & Locations", "Pending Actions" (with 0 Explicit Access Requests and 1 Agency Contact Registrations), "Quicklinks" (with links for Create Notice, Mod/Amend Notice, Create Award, Cancel Notice, and Upload New Documents/Links), "Statistics" (with 1 Active Procurement Notices, 0 Archived Procurement Notices, 0 Active Non-FBO Solicitations, 1 Archived Non-FBO Solicitations, 0 Active Document Packages, and 0 Agency Users), "Account Switcher" (with a dropdown menu set to "DELAWARE RIVER BASIN COMMISSION" and a tip to click the globe icon), and "Announcements" (stating "There are no announcements at this time."). Four yellow arrows point to specific features: Arrow I points to the "Quicklinks" section; Arrow II points to the "Announcements" section; Arrow III points to the "Pending Actions" section; and Arrow IV points to the "Statistics" section.

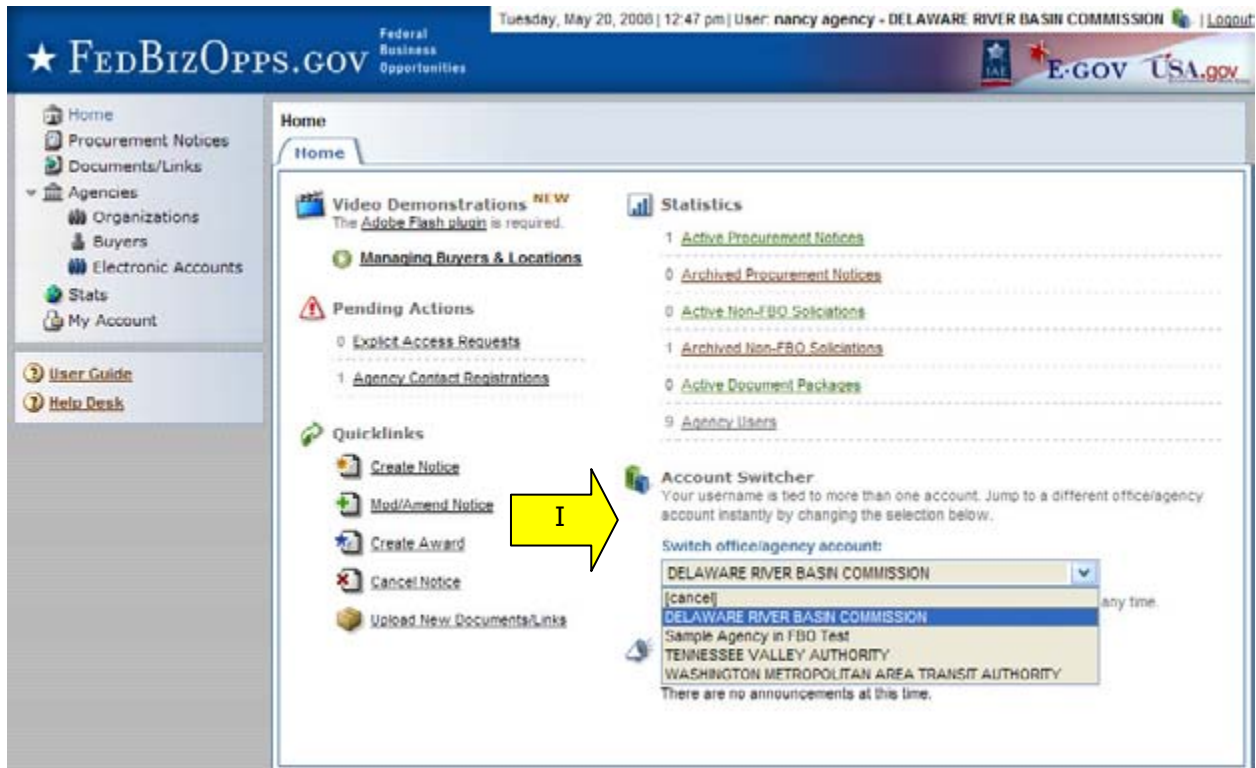
3.2.2 Multi-account Users

- 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.

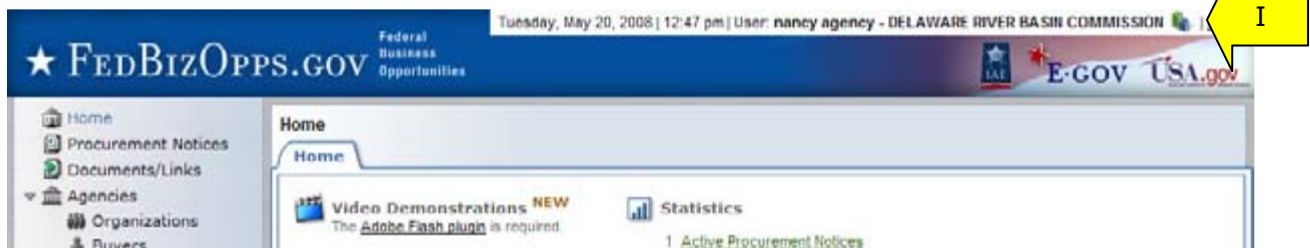
The screenshot displays the FEDBIZOPPS.GOV home page. At the top right, the user is identified as 'nancy agency' for the 'DELAWARE RIVER BASIN COMMISSION'. A yellow arrow labeled 'III' points to this user information. The main content area includes sections for 'Video Demonstrations', 'Managing Buyers & Locations', 'Pending Actions', 'Quicklinks', 'Statistics', 'Account Switcher', and 'Announcements'. The 'Account Switcher' section features a dropdown menu with 'DELAWARE RIVER BASIN COMMISSION' selected, and a yellow arrow labeled 'I' points to this dropdown. A tip below the dropdown states: 'Tip: click the icon at the top of the page to switch accounts at any time.' The 'Quicklinks' section includes options like 'Create Notice', 'Mod/Amend Notice', 'Create Award', 'Cancel Notice', and 'Upload New Documents/Links'.

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

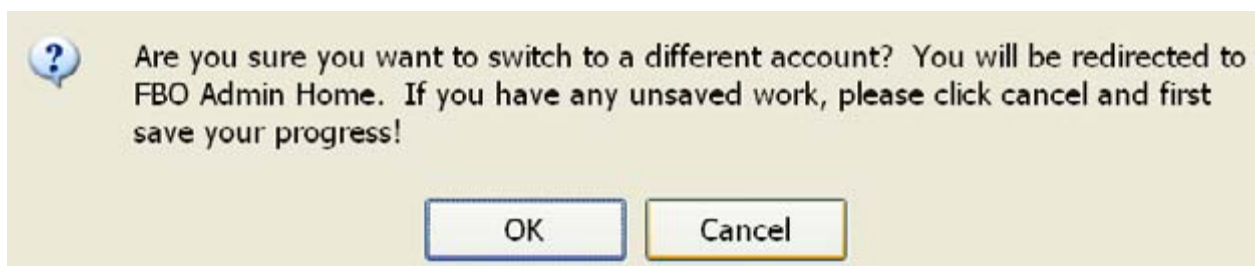
Home Page Option to switch account:



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

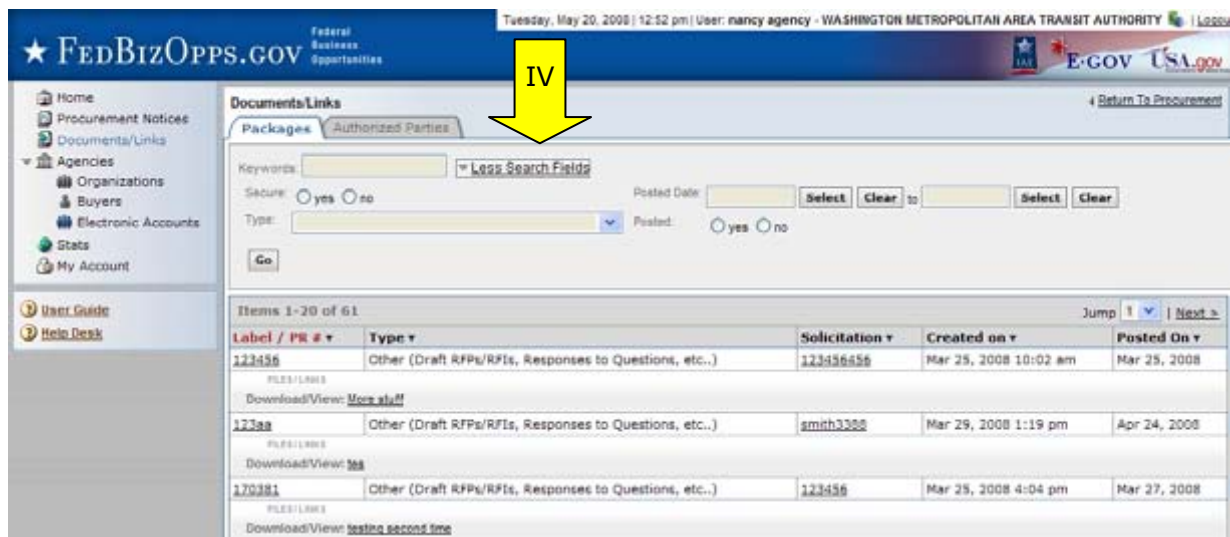
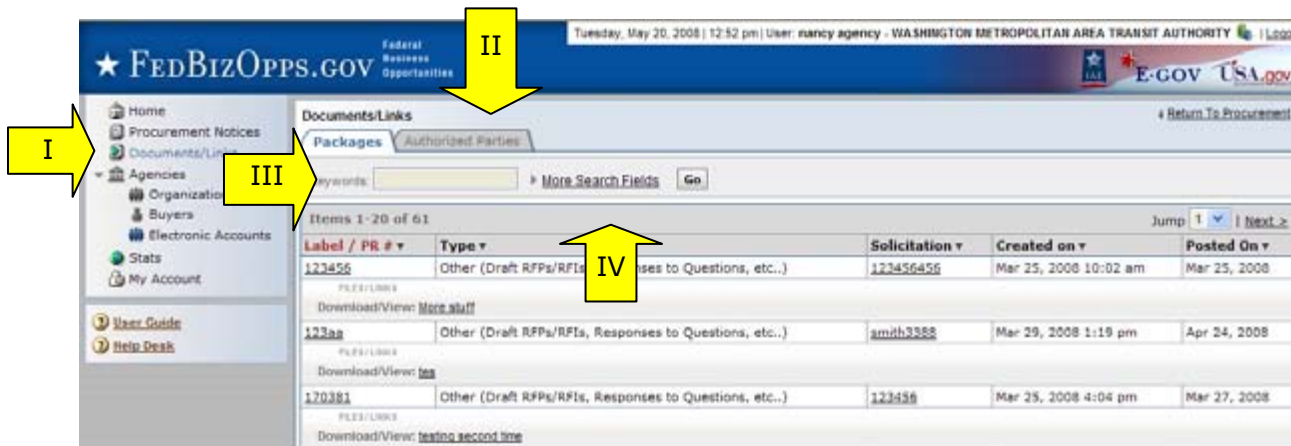
- I. There are four sub-tabs on the "Procurement Notices" page. "Procurement Notices" lists all "Posted" (viewable on vendor interface).
- II. The "draft" sub-tab lists draft notices (not viewable on vendor interface).
- III. The Archived sub-tab presents a list of archived notices.
- IV. Non-FBO Solicitations 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 website interface. The top navigation bar includes the site logo and user information. Below the navigation bar, there are four sub-tabs: "Procurement Notices", "Drafts", "Archived", and "Non-FBO Solicitations". Four yellow arrows labeled I, II, III, and IV point to these tabs respectively. The main content area displays a table of procurement notices with columns for Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. The table shows several entries, including one titled "Telephones" and others labeled "one", "two", "three", and "You can reach the FedBizOpps Help Desk by clicking on the Help Desk link".

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	Telephones	123456789	Presolicitation	test section	5	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm
RELATED NOTIFICATIONS AND DRAFTS								
Name: Draft Modification Posted: ✗								
Name: Draft Modification Posted: ✗								
	one	one	Presolicitation	test section	5	✓	Apr 26, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	two	two	Presolicitation	test section	5	✓	Apr 04, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	three	three	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:12 pm
	You can reach the FedBizOpps Help Desk by clicking on the Help Desk link	6786786	Presolicitation	test section	5	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:13 pm

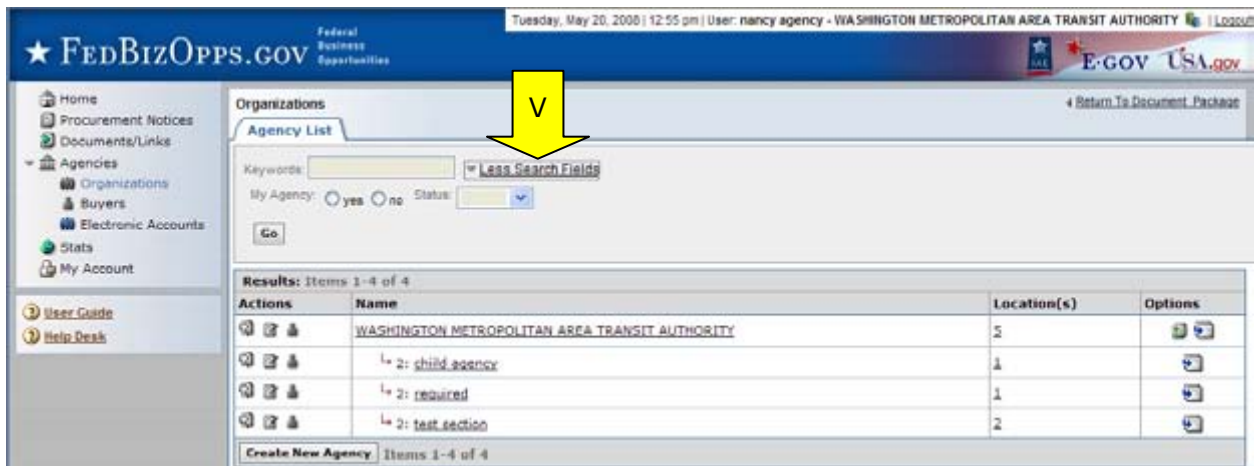
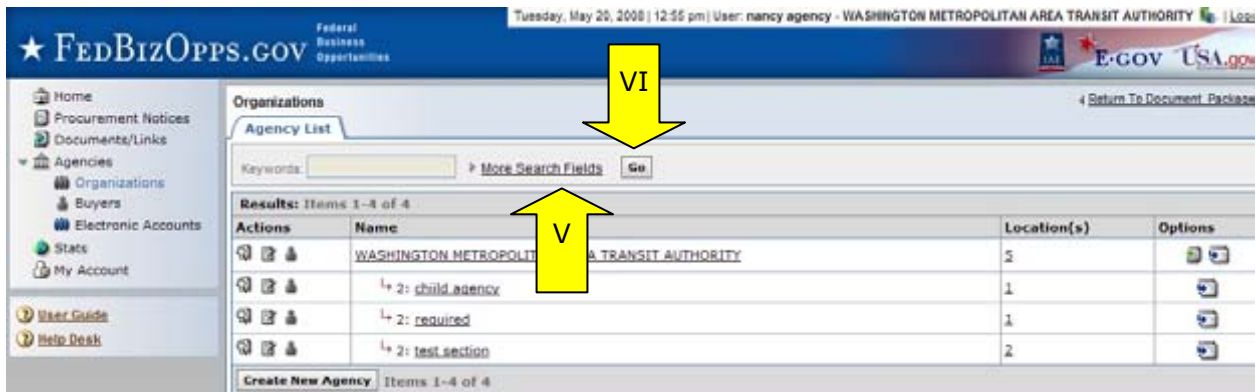
3.2.4 Document / Links

- 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 requests" for authorization, and "rejected requests" for authorization.
- III. The keywords search allows a user to conduct a full word search of the document title.
- IV. The "more search fields" link opens up additional search filters ('less search fields' closes the added search filters).



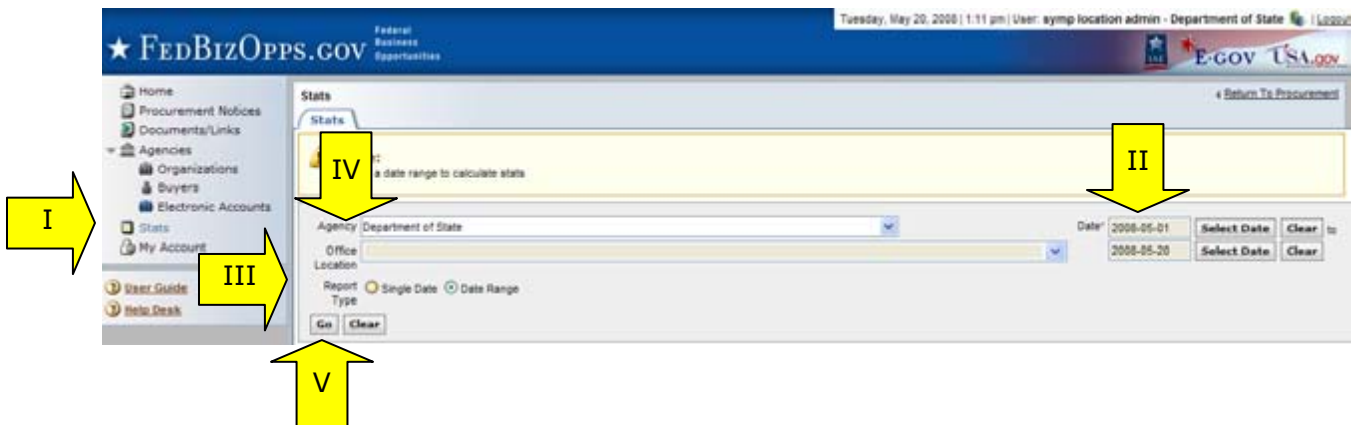
3.2.5 Agencies

- 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 search fields links" to add additional search filters.
- VI. Use "Go" to submit a search.



3.2.6 Stats

- I. "Stats" is a resource tool that allows the user to view FBO system activity for an organization.
- II. Data can be pulled for a particular day or for a range of days. When using range, queries are limited to 31 days for system performance reasons.
- III. If range is selected, each day's data will be presented separately in the results. Use the report type field to select "single date" or "date range"
- IV. Users can review stats for their agency level and below in the organizational hierarchy. Use the "agency" field to set the target of analysis.
- V. Select "go" to submit the stats request.



I. Stats Report Categories:

- Users by user type
- Active Postings by posting type
- Active packages by secure / non-secured
- Archived Posting by posting type
- Archived packages by secure / non-secured

II. Totals are presented for each report category.

 **Statistics**

May 20, 2008

721 Buyers

 592 Engineers

 929 Vendors (On Watchlist)



2,242 Total

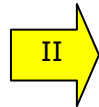
Active Postings

414 Presol

 979 Mods

 159 Awards

 49 Sources Sought



0 Foreign Standard

 0 Sale Surplus

 40 Special Notice

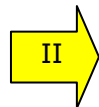
191 Combined Synopsis/Solicitation

1,832 Total

Active Packages

570 Non-Secure Packages

 5 Secure Packages



575 Total

Archived Postings

955 Presol (Archived)

 3,068 Mods (Archived)

 720 Awards (Archived)

 630 Sources Sought (Archived)



0 Foreign Standard (Archived)

 0 Sale Surplus (Archived)

 273 Special Notice (Archived)

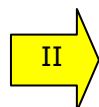
1,719 Combined (Archived)

7,383 Total

Archived Packages

853 Non-Secure Packages (Archived)

 0 Secure Packages (Archived)



853 Total

3.2.7 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.

The screenshot displays the 'My Account' page for a location admin on FedBizOpps.gov. The page is titled 'symp location admin: Contact Info' and has two tabs: 'Contact Information' and 'Account'. The 'Contact Information' tab is active, showing 'Agency User Information' with the following details:

- Full name: symp location admin
- First name: symp
- Middle name: location
- Last name: admin
- Email: support@federalbiz.com

Below the user information are 'Edit' and 'Return' buttons. To the right, the 'Agency Information' table is shown:

Agency	AGENCY REPORT AGENCY NAME
Office	Top Level
Role (s):	Agencyadmin

Yellow arrows labeled I, II, and III indicate key elements: Arrow I points to the 'My Account' link in the left navigation menu; Arrow II points to the 'Agency Information' table; Arrow III points to the 'Edit' button at the bottom of the user information section.

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

symp location admin: Contact Info

Agency User Information
 Edit your personal information

Title:

Full Name:

First Name:

Middle Name:

Last Name:

Suffix:

Email:

Phone:

Cell Phone:

Fax:

I Save Delete Return

Agency Information	
Agency	AGENCY REPORT AGENCY NAME
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 FedBizOpps.gov website interface. At the top, the header includes the site logo, the date and time (Tuesday, April 15, 2008 | 3:36 pm), the user name (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for 'Switch Account' and 'Logout'. Below the header, there is a navigation menu on the left with options like Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled 'nancy agency: Account' and has two tabs: 'Contact Information' and 'Account'. A yellow arrow labeled 'I' points to the 'Account' tab. Below the tabs, there is a 'Save' button and a note '* indicates a required field'. The 'Account Information' section contains a 'Username' field with the value 'nancyagency' and a note 'Used to login'. Below this are two password fields: 'Enter New Password' and 'Verify Password'. A yellow arrow labeled 'II' points to the 'Save' button at the bottom of the form.

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, date (Thursday, April 17, 2008), user information (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and a 'Logout' link. The left sidebar contains a navigation menu with 'Procurement Notices' highlighted. The main content area is titled 'Procurement Notices' and features tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. A search bar with 'Keywords/SOL #' and 'ph' is present. Below the search bar is a table with 2 items. The first item is a 'test solicitation' with Sol/Ref Number 'alphacoalum', Type 'Combined Synopsis/Solicitation', Agency 'test section', Location '2nd office', and Modified date 'Apr 16, 2008 4:00 pm'. The second item is 'Telephones' with Sol/Ref Number '123456789', Type 'Presolicitation', Agency 'test section', Location '5', and Modified date 'Mar 21, 2008 2:17 pm'. Below the table are sections for 'RELATED MODIFICATIONS: AWARDS' and 'Draft Modification' entries. At the bottom of the main content area is an 'Add New' button.

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	test solicitation	alphacoalum	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 16, 2008 4:00 pm
	Telephones	123456789	Presolicitation	test section	5	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm

- 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' page on the FEDBIZOPPS.GOV website. The page title is 'Create New Notice' and the step is '1 Notice Type'. The form contains the following fields:

- Agency/Office***: A dropdown menu with 'Sample Agency in FBO Test' selected.
- Contracting Office Location***: A dropdown menu with 'Office of SAFT - Administrators' selected.
- Type***: A dropdown menu with 'Presolicitation' selected.
- Solicitation Number***: A text input field with instructions: 'Agency assigned number for control, tracking, and identification. Please use ONLY alphanumeric and - _ () characters [no spaces].'

At the bottom of the form, there 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):
- Title* - description of services, supplies, or project required. NOTE: 256 character limit.
 - Classification Code* -
 - NAICS Code*
 - Response Date*
 - Primary Point of Contact*
 - Secondary Point of Contact
 - Description*
 - Place of Contact Performance
 - Set Aside
 - Archiving Policy* (note - notices archive the morning of this date).
 - Allow Vendors to Add/Remove From Interested Vendors*
 - Allow Vendors to View Interested Vendors List*

The screenshot shows the 'Create New Notice' form on the FEDBIZOPPS.GOV website. The page header includes the date 'Wednesday, April 16, 2008 | 7:08 pm' and the user 'nancy agency - Sample Agency in FBO Test'. The navigation menu on the left includes 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account'. The main content area is titled 'Create New Notice' and shows 'Step 2: Notice Details'. The form includes the following fields and information:

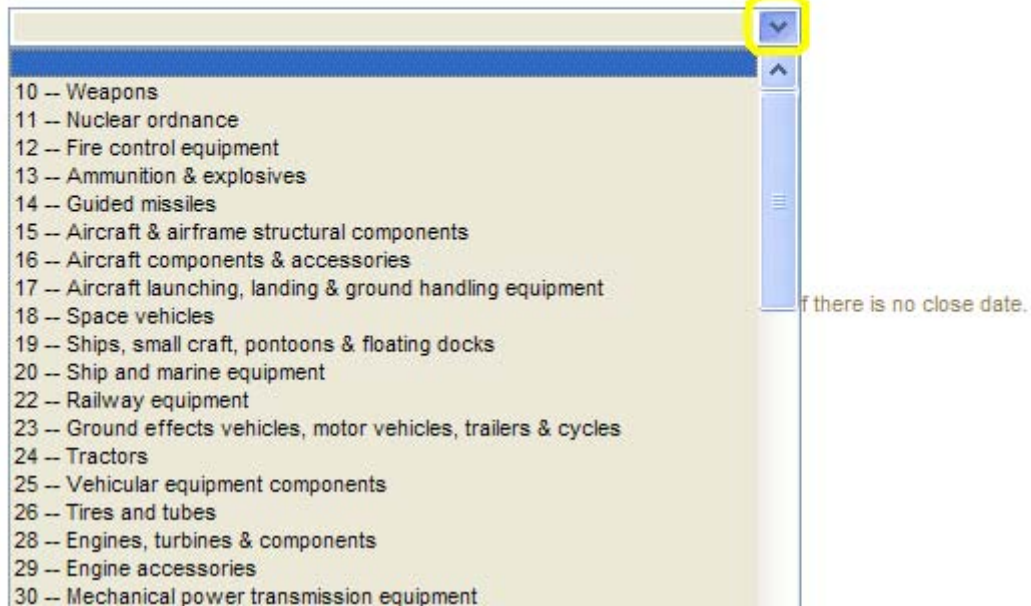
- Notice Type:** 1
- Notice Details:** 2 (Current step)
- Attachments:** 3
- Review/Submit:** 4
- Solicitation #:** asdfadf
- Procurement Type:** Presolicitation
- Date Posted:** April 16, 2008
- Title:** Brief title description of services, supplies, or project required by the posting agency. Note: 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.



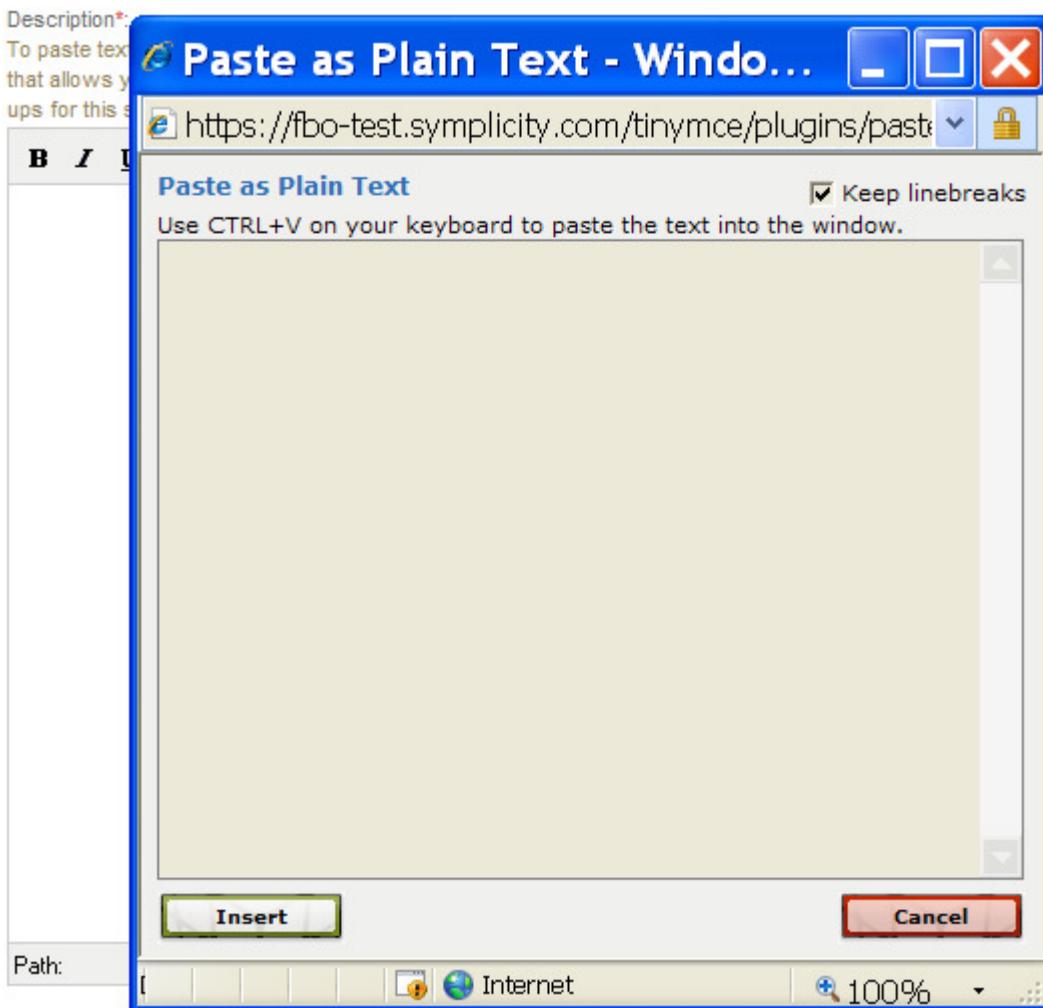
- II. If you start to type the numeric code, the system will present codes containing that string of values.



- 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 process 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.



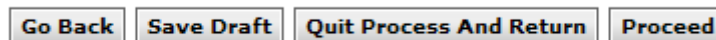
There are four options at the bottom of the form which the user can use on this form.

- 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:

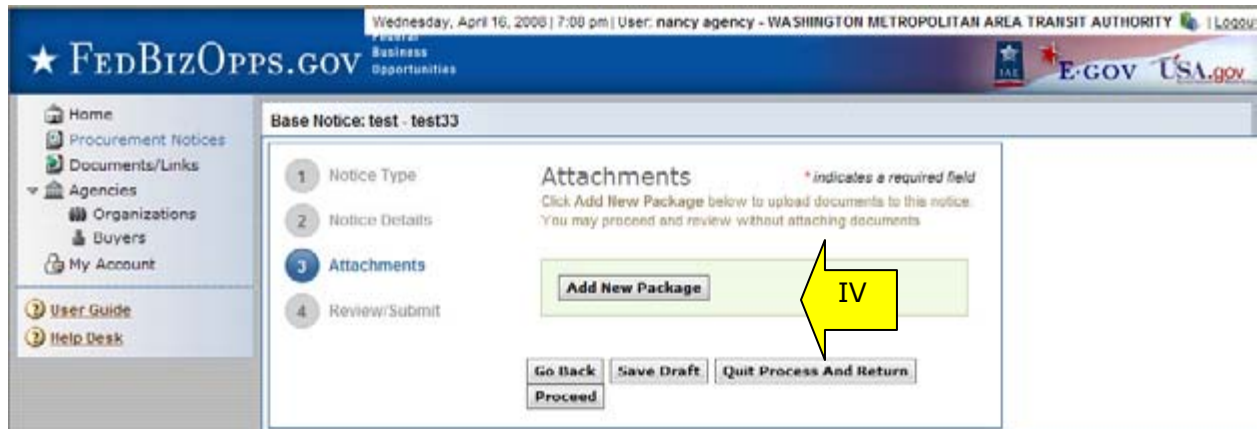
Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	417buyersol	78979a8sd7f	Combined Synopsis/Solicitation	test section	2nd office	✓	-	Apr 17, 2008 11:33 am
RELATED MODIFICATIONS / AWARDS								
Name: <u>Modification 1</u> Posted: Apr 17, 2008								
	test solicitation	alphasolnum	Combined Synopsis/Solicitation	test section	2nd office	-	-	Apr 16, 2008 4:00 pm
RELATED MODIFICATIONS / AWARDS								
Name: <u>Modification 1</u> 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: <u>Award</u> Posted: Mar 23, 2008								
Name: <u>Modification 1</u> 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). I
- 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).



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 E-GOV USA.gov

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).

Business Opportunities

E-GOV USA.gov

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](#)

FEDBIZOPPS.GOV Federal Business Opportunities

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Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

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/RFIs, 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

(Note – If the Bid Module is enabled, 'Review / Submit' becomes Step 5 in the process. See section 5 for more details on the Bid Module functionality.)


- 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 76 for more details.
- VII. "Post" moves the notice for review by users.

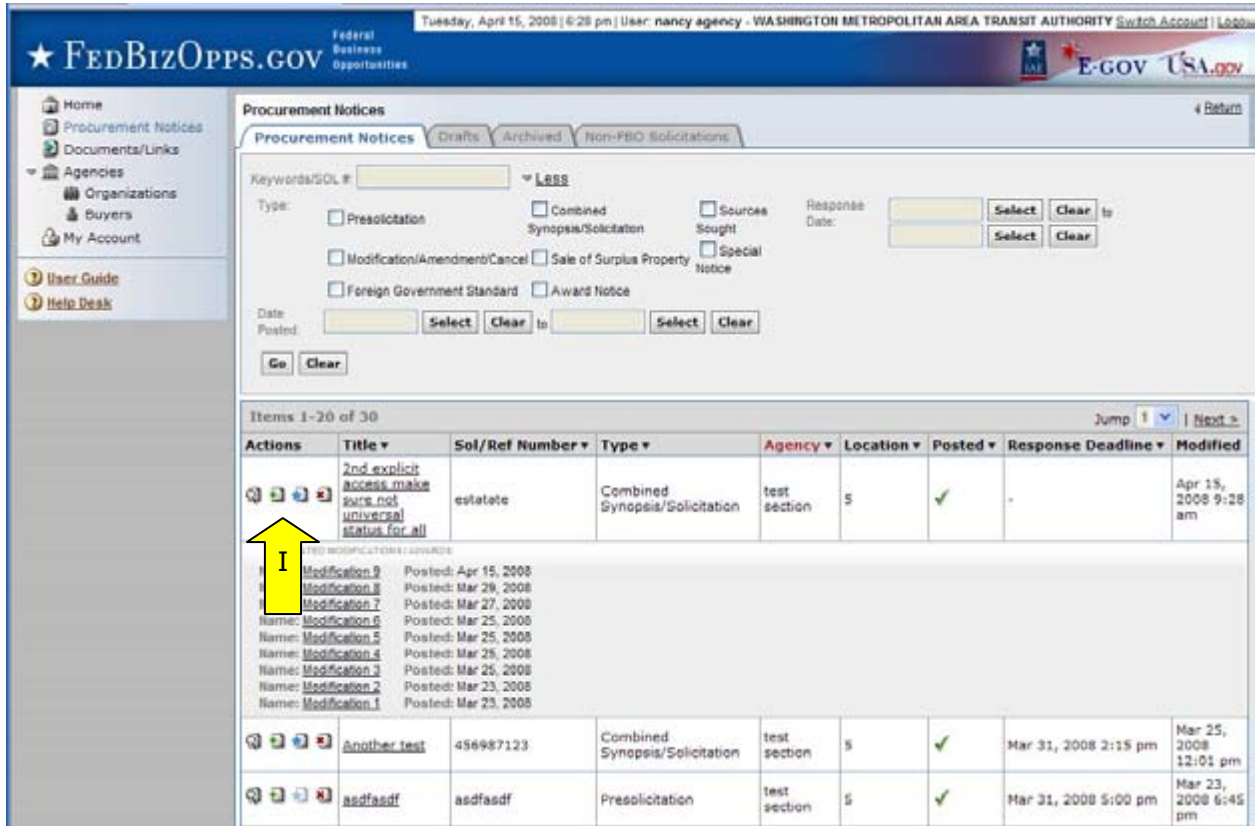
The screenshot displays the 'Review/Submit' step of a notice creation process on the FEDBIZOPPS.GOV website. The page title is 'Base Notice: test - test33'. A navigation pane on the left shows the current step as '4 Review/Submit'. A central panel contains a 'Notice Details' form with the following information:

- 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:

At the top of the form, a green box contains the instruction: '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 instruction are buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', 'Delete', 'Print', and 'Post'. A yellow arrow labeled 'VII' points to the 'Post' button.

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.






Keywords/SQL #: LESS

Type: Presolicitation Combined Synopsis/Solicitation Sources Sought Special Notice

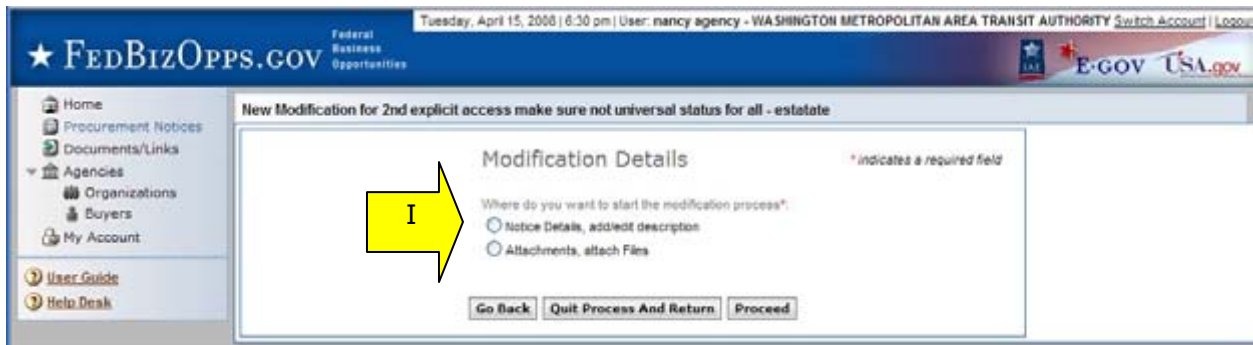
Modification/Amendment/Cancel Sale of Surplus Property Award Notice

Foreign Government Standard

Date Posted: to

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	2nd explicit access make sure not universal status for all	estatele	Combined Synopsis/Solicitation	test section	5	✓	-	Apr 15, 2008 9:28 am
<p>FOR MODIFICATION APPROVE:</p> <p>Name: Modification 9 Posted: Apr 15, 2008</p> <p>Name: Modification 8 Posted: Mar 29, 2008</p> <p>Name: Modification 7 Posted: Mar 27, 2008</p> <p>Name: Modification 6 Posted: Mar 25, 2008</p> <p>Name: Modification 5 Posted: Mar 25, 2008</p> <p>Name: Modification 4 Posted: Mar 25, 2008</p> <p>Name: Modification 3 Posted: Mar 25, 2008</p> <p>Name: Modification 2 Posted: Mar 23, 2008</p> <p>Name: Modification 1 Posted: Mar 23, 2008</p>								
	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. 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.



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 | 6:30 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. A left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled 'New Modification for 2nd explicit access make sure not universal status for all - estatestate'. Below this is a 'Modification Details' form with a yellow arrow labeled 'I' pointing to the 'Notice Details, add/edit description' radio button. The form also includes an 'Attachments, attach Files' radio button and three buttons: 'Go Back', 'Quit Process And Return', and 'Proceed'. A note indicates that an asterisk (*) denotes a required field.

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).

The screenshot shows the 'Modification Details' form on the FEDBIZOPPS.GOV website. The form is titled 'Modification Details' and includes a note: '* indicates a required field'. The form contains the following sections:

- 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

At the bottom of the form, there are three buttons: 'Go Back', 'Quit Process And Return', and 'Proceed'. A yellow arrow labeled 'I' points to the 'Do you want to change the existing description or simply add to it?' section.

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

Notice Details

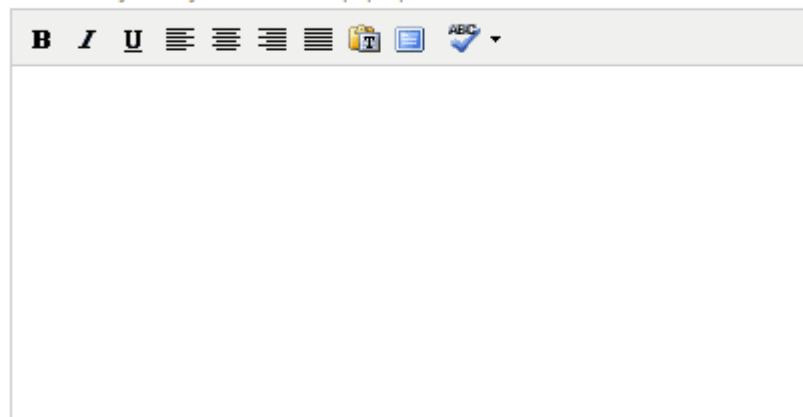
** indicates a required field*

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*:

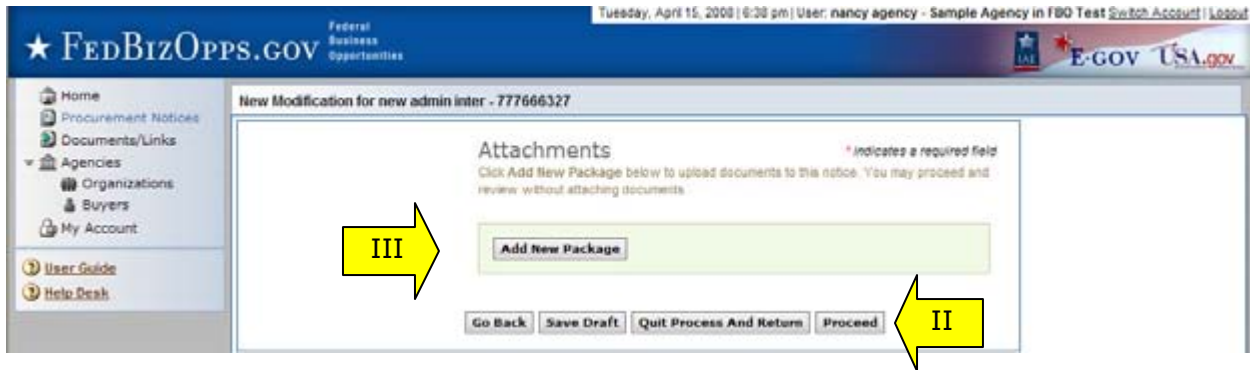
To paste text into this field, click the icon with the letter T, or press CTRL+V. That will open a pop-up window that allows you to paste in the text. Click "insert" to add the text to the field. Note: you may need to allow pop-ups for this site.

A screenshot of 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 font color dropdown menu. Below the toolbar is a large, empty text area for editing.

- 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**

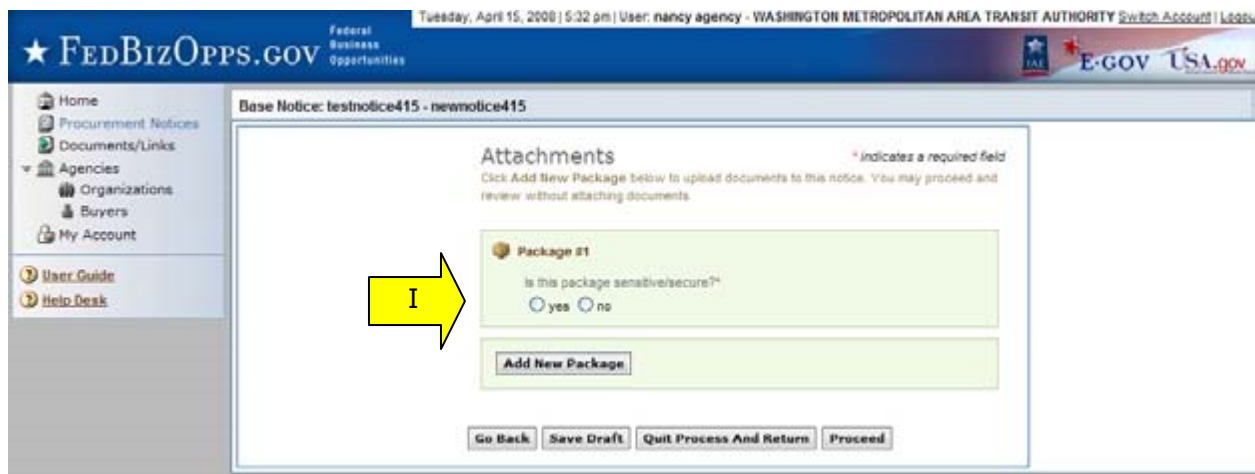
- I. The next step allows the user to attach documents or packages to the notice. A Package is simply a collection of Documents bundled together for review.
- II. If a user does not wish to attach any documents/packages, they may use "proceed" button to move to the next step without attaching any documents.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



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 displays the 'Attachments' section of the FEDBIZOPPS.GOV website. The header shows the date 'Tuesday, April 15, 2008 1:53:22 pm' and the user 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The left sidebar contains navigation links such as 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', and 'My Account'. The main content area is titled 'Base Notice: testnotice415 - newnotice415' and 'Attachments'. It includes instructions: 'Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents.' Below this is a form for 'Package #1' with the question 'Is this package sensitive/secure?' and two radio buttons for 'yes' and 'no'. A yellow arrow labeled 'I' points to the 'yes' radio button. There is an 'Add New Package' button and a row of action buttons at the bottom: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'.

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

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: '* indicates a required field'. Below the heading, there is a sub-heading 'Package #1' and a question: 'Is this package sensitive/secure?*' with radio buttons for 'yes' and 'no'. Another question asks: 'Do you want to create new or attach/select existing?*' with radio buttons for 'Create New' and 'Attach/Select Existing'. Below this, there is a text input field for 'Enter PR# To Search Existing:' and a 'Find Package' button. At the bottom of the form area is an 'Add New Package' button. At the very bottom of the page are buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'. A yellow arrow labeled 'I' points to the 'Attach/Select Existing' radio button.

- 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**

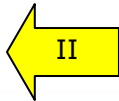
File*:

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](#)

FEDBIZOPPS.GOV Federal Business Opportunities

E.GOV USA.gov

Home
Procurement Notices
Documents/Links
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My Account

User Guide
Help Desk

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*
 MultiAmendment cannot be selected for base notices
 Solicitation
 Mod/Amendment
 Other (Draft RFPs/RFs, Responses to Questions, etc.)

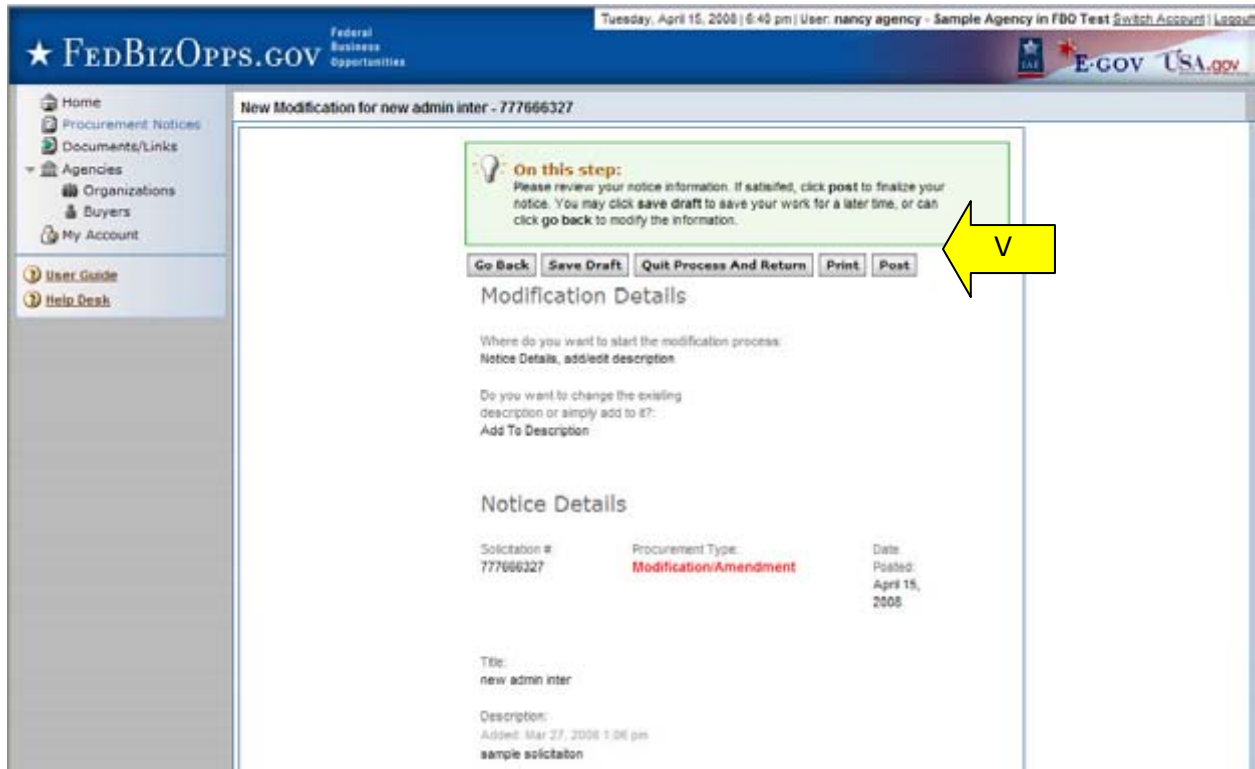
File / Link #1

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

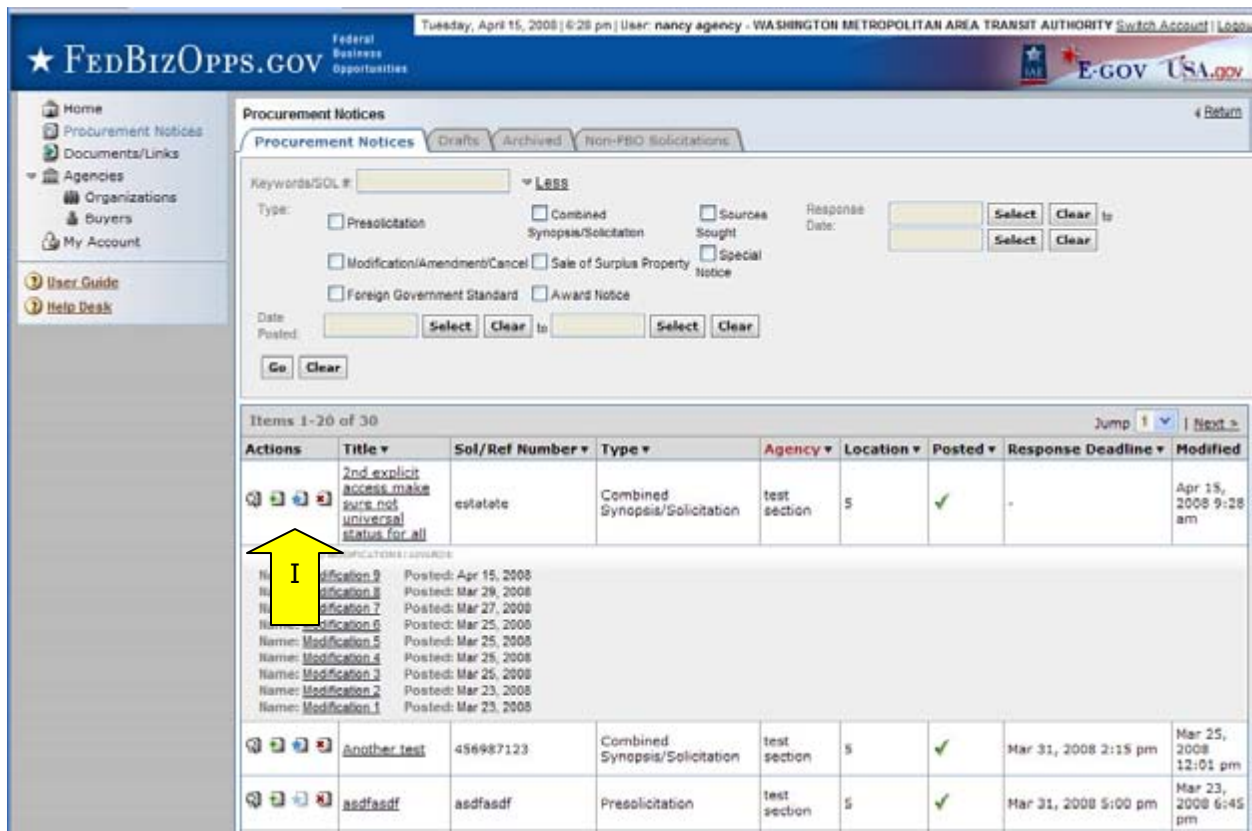
← X

- I. At 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.















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.



The screenshot displays the 'Procurement Notices' page on FEDBIZOPPS.GOV. The page includes a navigation sidebar on the left with links to Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The main content area features a search and filter interface with tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Below this is a table of items with the following columns: Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. A yellow arrow points to the 'Award' icon in the Actions column of the first row.

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
<p>Modification 9 Posted: Apr 15, 2008</p> <p>Modification 8 Posted: Mar 29, 2008</p> <p>Modification 7 Posted: Mar 27, 2008</p> <p>Modification 6 Posted: Mar 25, 2008</p> <p>Name: Modification 5 Posted: Mar 25, 2008</p> <p>Name: Modification 4 Posted: Mar 25, 2008</p> <p>Name: Modification 3 Posted: Mar 25, 2008</p> <p>Name: Modification 2 Posted: Mar 23, 2008</p> <p>Name: Modification 1 Posted: Mar 23, 2008</p>								
   	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

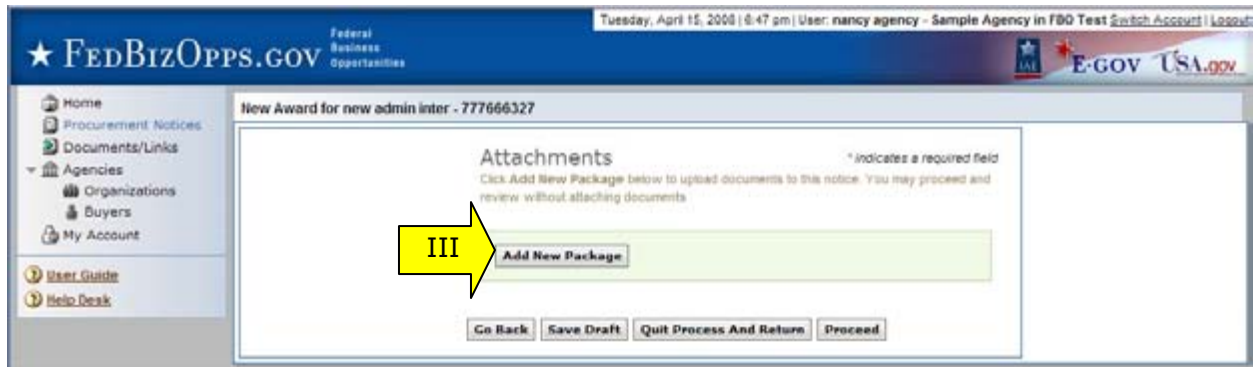
- I. In creating an award notice, the user is required to enter the contract award date, contract award number, contract dollar amount, and awarded contractor name.
- II. Contract Line Item Number and Contractor Awarded Address are not required fields.

The screenshot shows the 'New Award for new admin inter - 777666327' form on the FEDBIZOPPS.GOV website. The form is titled 'Notice Details' and includes the following fields and information:

- Solicitation #:** 777666327
- Procurement Type:** Award Notice
- Date Posted:** April 15, 2008
- Title*:** new admin inter (Note: 256 character limit)
- Classification Code:** 10 -- Weapons
- NAICS Code:** 313222 -- Schiff Machine Embroidery (Note: Having Problems With This Field? Click Here.)
- Contract Award Date*:** (Field with 'Select Date' and 'Clear' buttons)
- Contract Award Number*:** (Field with instructions: Agency assigned number for control, tracking, and identification. Please use ONLY alphanumeric and - _ () characters [no spaces].)
- Contract Award Dollar Amount*:** (Field with instructions: The dollar amount of the contract, plus delivery and handling charges, plus interest, plus any other charges.)

- 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.

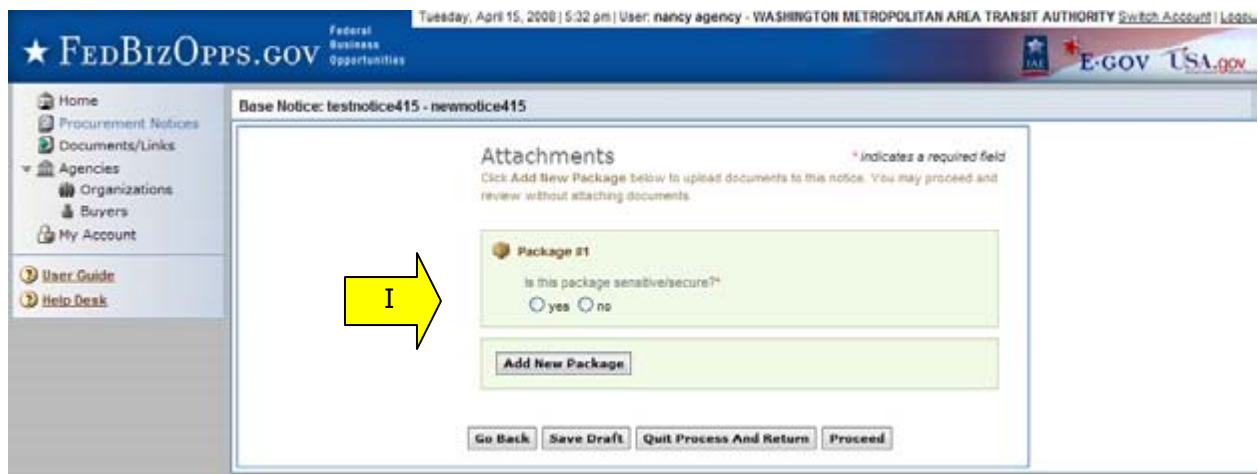
- I. The next step allows the user to attach documents or packages to the award notice. A Package is simply a collection of Documents bundled together for review.
- II. If a user does not wish to attach any documents/packages, they may use "proceed" button to move to the next step without attaching any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



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 displays 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 sub-heading 'Package #1' and a question: 'Is this package sensitive/secure?'. There are two radio buttons, 'yes' and 'no', with the 'yes' button selected. A yellow arrow labeled 'I' points to the 'yes' radio button. Below the question is an 'Add New Package' button. At the bottom of the form, there are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'. The left sidebar contains navigation links: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The top header shows the date 'Tuesday, April 15, 2008 1:53:22 pm' and the user 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'.

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

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 | 5:32 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY". A sidebar on the left contains navigation links: Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk. The main content area is titled "Base Notice: testnotice415 - newnotice415" and "Attachments". It contains a form with the following fields and options:

- Package #1** (indicated as a required field)
- Is this package sensitive/secure? (radio buttons for yes and no)
- Do you want to create new or attach/select existing? (radio buttons for Create New and Attach/Select Existing)
- Enter PR# To Search Existing: (text input field)
- Use "find package" to find that pr on the system if it already exists. (text input field)
- Find Package** button
- Add New Package** button
- Buttons at the bottom: **Go Back**, **Save Draft**, **Quit Process And Return**, **Proceed**

A yellow arrow labeled "I" points to the "Attach/Select Existing" radio button.

- 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](#)

FEDBIZOPPS.GOV Federal Business Opportunities E-GOV USA.gov

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

Base Notice: draft print - testttttt

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*
 MultiAmendment 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 header includes the site logo, the text 'Federal Business Opportunities', and the user information: 'Tuesday, April 15, 2008 6:50 pm | User: nancy agency - Sample Agency in FBO Test Switch Account | Logout'. The main content area is titled 'New Award for new admin inter - 777666327'. A green box contains the instruction: '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 are buttons for 'Go Back', 'Save Draft', 'Quit Process And Return', 'Print', and 'Post'. A yellow arrow labeled 'V' points to the 'Post' button. The 'Notice Details' section shows: Solicitation #: 777666327, Procurement Type: Award Notice, and Date Posted: April 15, 2008. A 'Title:' label is visible at the bottom of the notice details area.

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.

The screenshot shows the 'Procurement Notices' section of the FEDBIZOPPS.GOV website. The page includes a search filter with the following details:

- 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
- Buttons: Go Clear

The table below shows a list of notices. A yellow arrow labeled 'I' points to the 'Cancel' icon in the 'Actions' column of the first row.

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
   	2nd explicit access make exis. not universal status for all	estatele	Combined Synopsis/Solicitation	test section	S	✓	-	Apr 15, 2008 9:28 am
<small>ITEMS APPROVED</small> Name: Notice 9 Posted: Apr 15, 2008 Name: Notice 8 Posted: Mar 29, 2008 Name: Notice 7 Posted: Mar 27, 2008 Name: Notice 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	S	✓	Mar 31, 2008 2:15 pm	Mar 25, 2008 12:01 pm
   	asdfasdf	asdfasdf	Presolicitation	test section	S	✓	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.

The screenshot shows the 'Cancellation Details' form on the FEDBIZOPPS.GOV website. The form is titled 'Cancellation for new admin inter - 77766327'. It includes a table with the following information:

Solicitation #	Procurement Type	Date Posted
77766327	Cancellation	April 15, 2008

Below the table, there is a 'Title' field with the text 'new admin inter'. The 'Cancellation Description*' field is empty and has a rich text editor toolbar below it. A yellow arrow labeled 'I' points to the Cancellation Description field.

- 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.

- 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. The header includes the site logo, the text 'Federal Business Opportunities', and the date 'Tuesday, April 15, 2008 | 6:57 pm'. The user is identified as 'nancy agency - Sample Agency in FBO Test'. The main content area is titled 'Cancellation for new admin inter - 777666327'. A green box contains the instruction: '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 are five buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', 'Print', and 'Post'. A yellow arrow points to the 'Post' button. The 'Notice Details' section shows the following information:

Solicitation #:	Procurement Type:	Date Posted:
777666327	Cancellation	April 15, 2008

Title:
new admin inter

Cancellation Description:
cancelled per budget

Classification Code:
10 -- Weapons

NAICS Code:
313222 -- Schiff Machine Embroidery

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 displays the 'Procurement Notices' section of the FEDBIZOPPS.GOV website. The interface includes a navigation menu on the left, search filters at the top, and a table of notices. The table has the following columns: Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. The first row shows a 'draft print' icon in the Actions column, which is highlighted by a yellow arrow labeled 'II'. The second row shows a red 'X' in the 'Posted' column, highlighted by a yellow arrow labeled 'I'. Below the table, there is a section for 'RELATED MODIFICATIONS / AWARDS' with a link to 'Modification 9' posted on Apr 15, 2008.

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



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.

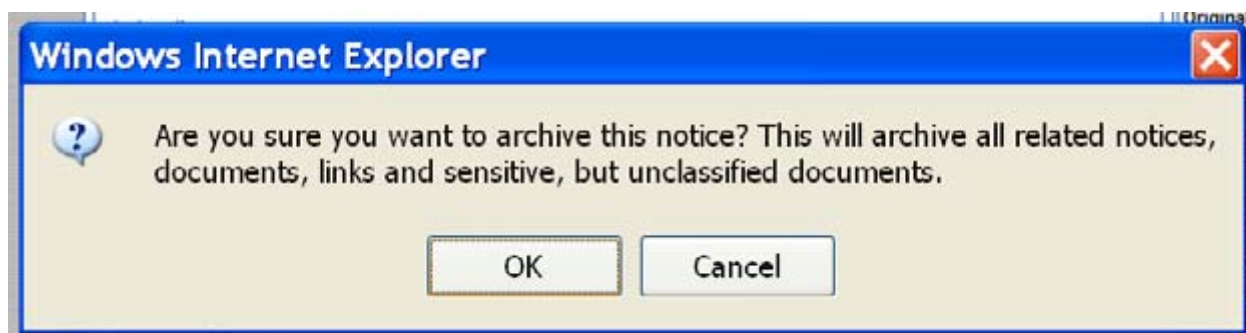
The screenshot shows the 'Procurement Notices' page on FEDBIZOPPS.GOV. The page includes a navigation sidebar on the left and a main content area. The main content area has a search filter section with various checkboxes for notice types (e.g., Procurement, Combined Synopsis/Solicitation, Sources Sought, etc.). Below the filters is a table of notices. The first row of the table is highlighted, and a yellow arrow labeled 'I' points to the review icon in the 'Actions' column of this row.

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

Below the table, there is a section for 'RELATED MODIFICATIONS / AMENDMENTS' listing several modifications from Modification 1 to Modification 9, each with a 'Posted' date.

The screenshot shows the 'Modification Information' page for a specific notice. The page title is 'Modification 9: 2nd explicit access make sure not universal status for all - estate'. Below the title is a 'Note' box stating: 'This notice has been posted. Any changes must be done in the form a new modification/amendment notice'. Below the note is an action bar with buttons: 'Return To List', 'Modify/Amend', 'Archive', 'Delete This Mod', and 'Print'. A yellow arrow labeled 'II' points to the 'Archive' button. The main content area displays the notice details, including Solicitation (estate), Agency/Office (test section), Location (5), Title (2nd explicit access make sure not universal status for all), and Description (Added: Mar 23, 2008 2:58 pm; asdfasd). On the right side, there are two panels: 'Procurement Notice Info' showing creation and modification dates, and 'Notice History' showing a list of previous modifications.

- I. 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 interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 7:04 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, My Account, User Guide, and Help Desk. The main content area is titled 'Procurement Notices' and has three sub-tabs: 'Procurement Notices', 'Drafts', and 'Archived' (which is selected). Below the sub-tabs are search filters for 'Keywords/SQL #', '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' with date range selectors. A table below the filters shows one notice:

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

A yellow arrow labeled 'II' points to a small circular icon with a magnifying glass next to the first row of the table, indicating the view icon for that notice.

- 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 interface. At the top, it displays the date 'Tuesday, April 15, 2008 7:07 pm' and the user 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The main content area shows an 'Award: 5533hou / added export after original explicit added - testexpexport (Archived)'. A yellow banner with a warning icon states: 'Note: This award notice (and related documents) are archived.' Below this, there are two buttons: 'Return To List' and 'Unarchive'. A yellow arrow with the letter 'I' points to the 'Unarchive' button. The notice details include: Solicitation: testexpexport, Agency/Office: test section, Location: 5, Title: added export after original explicit added, Contract Award Date: March 31, 2008, and Description(s): REVISED description - note this bid is important opportunity for vendor to demonstrate competency. On the right side, there are sections for 'Procurement Notice (Archived) Info' and 'Notice History'.

The dialog box has a question mark icon and contains the text: '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' page on FEDBizOpps.gov. The page includes a navigation menu on the left and a search/filter section at the top. Below this is a table of notices. A yellow arrow labeled 'I' points to the review icon (a magnifying glass) in the 'Actions' column of the first row.

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

The screenshot shows the 'Notice Information' page for the notice 'Award: 5533hou / added export after original explicit added - testexpexport'. The page includes a navigation menu on the left and a 'Notice Information' section at the top. Below this is a 'Notice Information' section with details about the notice. A yellow arrow labeled 'II' points to the 'Print' button in the top navigation bar.

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.bohm
Modified: April 15, 2008 7:13 pm
By: nancy.bohm

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

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

- 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

FEDBIZOPPS.GOV Federal Business Opportunities

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 # [More](#)

Items 1-20 of 31 Jump | [Next >](#)

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	417buyersol	78979a85d7f	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								
	itest replication	aabb	Presolicitation	test section	5	✗	-	Apr 17, 2008 9:58 am
	added export after original expires 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								
	asdfasdf	asdfasdf	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

FEDBIZOPPS.GOV Federal Business Opportunities

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


User Guide | Help Desk

417buyersol - 78979a85d7f [Return] | [Return To List \(Procurement\)](#)

Notice Information | Packages | Interested Vendors

Keywords:

Results: Items 1-1 of 1

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

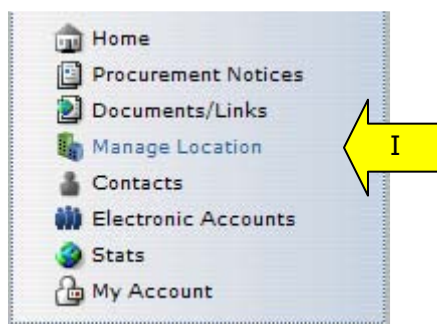
[Add New Interested Vendor](#) Items 1-1 of 1

5 Bid Module

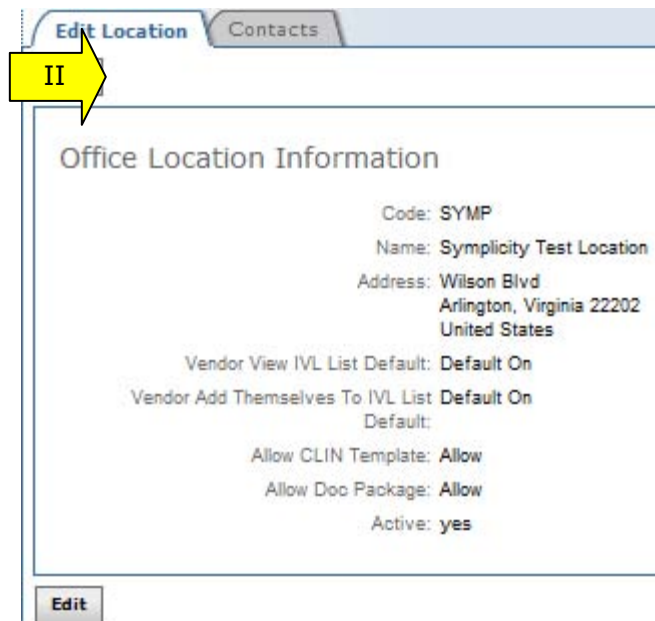
The Bid Module functionality allows buyers to receive and electronically evaluate vendor responses to notices. There are two possible types of electronic submissions, an Item (CLIN) Builder form and a Doc Package upload. Administrators determine whether or not their buyers are allowed to enable this feature for their notices.

5.1 Enable / Disable Bid Module

- I. After logging into the Administrator interface, go to "Manage Location" found in the left-hand navigation menu.



- II. Click on the "Edit" button.



- III. At the bottom of the "Edit Location" tab, there are two fields which are used to set the permission level for the Bid Module for all buyers registered at that location:
 - i. "Allow CLIN Template:"

1. If set to "Allow," buyers can create an Item (CLIN) Builder template as a possible vendor response type for any notice;
 2. If set to "Not Allow," buyers cannot create Item (CLIN) Builder templates as a possible vendor response type for any notice;
 3. If set to "Ignore," buyers cannot create Item (CLIN) Builder templates as a possible vendor response type for any notice.
- ii. "Allow Doc Package:"
1. If set to "Allow," buyers can enable document (file) uploads as a possible vendor response type for any notice;
 2. If set to "Not Allow," buyers cannot enable document (file) uploads as a possible vendor response type for any notice;
 3. If set to "Ignore," buyers cannot enable document (file) uploads as a possible vendor response type for any notice.

The screenshot shows the 'Edit Location' page with the following fields and options:

- Code:** SYMP
- Name:** Symplicity Test Location
- Address:**
 - Street:** Wilson Blvd
 - City:** Arlington
 - State:** Virginia
 - Zip:** 22202
 - Country:** United States
- Vendor View (V) List Default:** Forced On Forced Off Default On Default Off
- Vendor Add Themselves To (V) List Default:** Forced On Forced Off Default On Default Off
- CLIN Template:** Allow Not Allow Ignore
- Allow Doc Package:** Allow Not Allow Ignore
- File:** yes no

Yellow arrows labeled 'i' and 'ii' point to the 'Save' and 'Return' buttons at the top left of the form, respectively.

- IV. There are two options on this page to continue:
- i. "Save" saves any changes made to the Office Location Information;
 - ii. "Return" does not save any changes made, and returns the user to the previous page.

5.2 Create Notice

The Bid Module functionality allows buyers to receive and electronically evaluate vendor responses to notices. If the Location Administrator enables this feature, there will be an

additional step included in the "Create Notice" process outlined in section 4.1 called "Bids." Note, Location Administrators can choose to enable or disable the two response types (CLIN and Doc Package) independently from one another.

- I. After completing step three "Attachments" and clicking "Proceed," the next step is to indicate the preferred type(s) of electronic submission for the notice by clicking on the appropriate check box: CLIN and/or Doc Package.

Create New Notice

The screenshot shows the 'Create New Notice' process. On the left is a sidebar with five steps: 1. Notice Type, 2. Notice Details, 3. Attachments, 4. Bids, and 5. Review/Submit. The 'Bids' step is currently active. The main content area is titled 'Bids' and contains the following text: 'Electronic Submission/ Responses: Select the type of electronic submission that you would prefer'. Below this text are two checked checkboxes: 'CLIN' and 'Doc Package'. A yellow arrow labeled 'I' points to the 'Doc Package' checkbox. At the bottom of the main content area are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'.

- II. By selecting "CLIN," the buyer enables an online Item (CLIN) Builder which will serve as a template for the items that vendors will be requested to quote on.
- III. If "Doc Package" is selected, vendors will be able to submit document responses (file uploads) electronically.
- IV. The CLIN template includes the following fields:
 - a. Line Item Description*: Buyer provides a brief description about the Line Item;
 - b. Quantity*: Buyer enters the quantity of the Line Item;
 - c. "Add Line Item:" Buyer clicks this button to add as many additional parent line items as needed to complete the template;
 - d. "Add New Child Item:" Buyer can add unlimited child line items under each parent line item; the child line items will be indented when displayed.

Bids * indicates a required field

CLIN.

Edit CLIN information

Line Item Description*:
Provide a brief description about the Line Item

Line Item #1

Quantity*:
Enter the quantity of line item
1000

Children:
Add a child line item

Edit CLIN information

Line Item Description*:
Provide a brief description about the Line Item

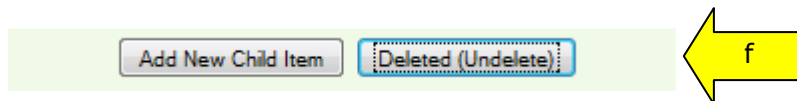
Child Line Item #1

Quantity*:
Enter the quantity of line item
500

Children:
Add a child line item

Add New Child Item

- e. "Delete:" Buyer can use this button to delete parent and/or child line items at any time during this process.
- f. "(Undelete):" If Buyer deletes a line item, the button will change to allow the buyer to "(Undelete)" the line item which will retain the values entered previously.



- V. The Buyer has four options at the bottom of the main page:
 - a. "Go Back" returns to the previous step in the process where changes can be made;
 - b. "Save Draft" saves data entered up to this point for later edits/review;
 - c. "Quit Process And Return" means that the solicitation will not be saved if selected when the notice was not previously saved as a draft;
 - d. "Proceed" takes the user to the next step in the process, "Bids, Review."

- VI. After clicking "Proceed," the buyer can review the type(s) of electronic submission selected and if applicable, the CLIN template created.

Create New Notice

1 Notice Type

2 Notice Details

3 Attachments

4 Bids

Type

CLIN Template

Review

5 Review/Submit

Bids * indicates a required field

Electronic Submission/ Responses:
Select the type of electronic submission that you would prefer
CLIN, Doc Package


CLIN:

Line Item Description	Quantity
Line Item #1	1000
Child Line Item #1	500
Line Item #2	750

Go Back Save Draft Quit Process And Return Proceed

- VII. The Buyer has four options at the bottom of this page:
- "Go Back" returns to the previous step in the process where changes can be made;
 - "Save Draft" saves data entered up to this point for later edits/review;
 - "Quit Process And Return" means that the solicitation will not be saved if selected when the notice was not previously saved as a draft;
 - "Proceed" takes the user to the next step in the process, "Review/Submit." See section 4.1.4 for more information on the next step.

5.3 Modify/Amend Notice

- 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: 
- Additionally, a user can use the quicklink "Mod/Amend Notice" on their "My FBO" page to modify / amend a notice. (See section 4.2.)
- During the "modification type" step in the modify/amend process, the user indicates at which step they want to start the modification process:
 - add to or edit the description (see section 4.2)
 - attach files to the notice (see section 4.2)
 - bids (CLIN/Doc Packages)

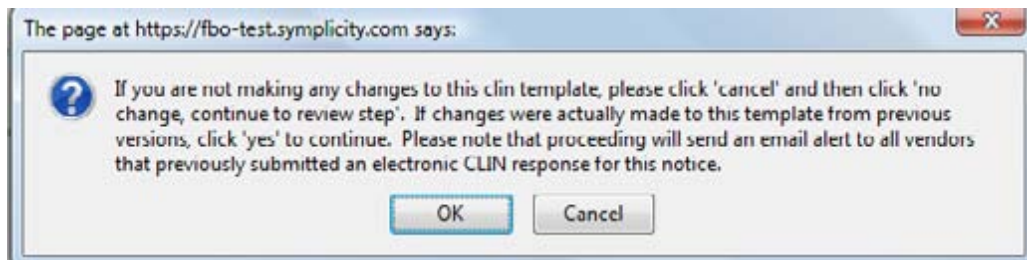
New Amendment for Bid Mod Test 39 - MM-FBO-039

- IV. If the user indicates that they would like to start the modification process at the "Bids" section, the system will first allow the user to review/modify the type(s) of electronic submission previously selected (CLIN and/or Doc Package).
- V. Note, if the user previously created a CLIN template, and deselects that option now, the system will recall the template if and when the user re-enables the CLIN option.

New Amendment for Bid Mod Test 39 - MM-FBO-039


- VI. At the bottom of the form for step five "Bids - Type," there are five options:
 - a. "Go Back" takes the user to step four Attachments;
 - b. "Save Draft" saves the modification in draft notice;
 - c. "Quit Process and Return" does not save the modification;
 - d. "No Change, Continue to Review Step" does not save any changes made to the form and takes the user to step six "Review / Submit;"
 - e. "Proceed" saves any changes made to the form and takes the user to the next step in the modification process.
- VII. If the user selects the CLIN type option and clicks "Proceed," the system will provide a CLIN Template for completion or modification.
 - a. If the user previously created a CLIN template and then disabled the option, the system will recall the original template for modification at this time.
 - b. The user can make any changes to the CLIN template form, including:
 - i. Edit Line Item Description;
 - ii. Edit Quantity;
 - iii. Add and/or Delete Line Item;

- iv. Add and/or Delete Child Line Item.
- VIII. At the bottom of the form for step five "Bids – CLIN Template," there are five options:
- "Go Back" takes the user to step five "Bids - Type;"
 - "Save Draft" saves the modification in draft notice;
 - "Quit Process and Return" does not save the modification;
 - "No Change, Continue to Review Step" does not save any changes made to the form and takes the user to step six "Review / Submit;"
 - "Proceed" saves any changes made to the form and takes the user to the next step in the modification process; note, if the user selects "Proceed," the system will provide the following warning message:



- IX. After clicking "OK," the system will move to the next step, "Bids – Review" at which point the user can review the type(s) of electronic submission selected, if any, as well as the CLIN template created, if applicable. There are four options at the bottom of the review page:
- "Go Back" takes the user to step five "Bids – CLIN Template;"
 - "Save Draft" saves the modification in draft notice;
 - "Quit Process and Return" does not save the modification;
 - "Proceed" saves any changes made to the Bids section and takes the user to the next step in the modification process.
- X. At step six, the user is able to review materials, and if appropriate to "post" the modification/amendment for vendor review; see section 4.2, page 57 for more information on this final step in the modification process.

5.4 Manage Vendor Electronic Responses

- A buyer can review vendor electronic responses by following the below steps:
 - Go to upper navigation "Notices" button or click on the "Active Procurement Notices" link on the "My FBO" page under Statistics.
 - Locate the desired notice in the list and click on the corresponding "Title," or use the view icon to open the Notice Information page. Look for: 
 - If the Bid Module is enabled for a notice, there will be an additional tab called "Bids/Responses" from where the user can review any vendor electronic response submissions for that notice.
 - Note, on this page, the user can also review the available type(s) of electronic submission, as well as the CLIN template created, if applicable.

Base Notice: Bid Mod Test 39 - MM-FBO-039
 RETURN RETURN TO LIST (NOTICES)

Notice Information Packages Bids/Responses Interested Vendors Print

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 Print

Notice Information

Solicitation: MM-FBO-039 Agency/Office: Office of Integrated Acquisition Environment

Location:

PROCUREMENT NOTICE INFO
 Created: February 16, 2009
 By: Micki Buyer
 Modified: February 16, 2009
 By: Micki Buyer

ELECTRONIC SUBMISSIONS
 Doc Package
[CLIN](#)

II. If there are no vendor electronic submissions, the tab will indicate no items found:

Bid Mod Test 39 - MM-FBO-039
 RETURN RETURN TO LIST (NOTICES)

Notice Information Packages Bids/Responses Interested Vendors

Keywords: Go

No items found

III. If available, vendor electronic response submissions will be displayed in spreadsheet fashion and will provide the following information:

- Vendor's first and last name;
- Vendor's company name;
- DUNS if available;
- Type(s) of electronic submission;
- Total Bid amount;
- Date the response was submitted.

Notice Information Packages Bids/Responses Interested Vendors

Keywords: Go

Batch Options Items 1-2 of 2

	Last Name	First Name	Contractor	DUNS	Type	Total Bid	Submitted On
	Vendor	Micki	FBO Test Vendor		CLIN, Doc Package	2,500.00	Feb 21, 2009 10:12 pm
	Vendor02	Micki	Test Vendor 2		CLIN, Doc Package	1,500.00	Feb 21, 2009 11:25 pm

IV. Click on the "View" icon to review the details of a vendor's electronic response; the system will display two sub-tabs for each response submitted, "Core" and "Notes:"

- The "Core" sub-tab provides details of the response, including:

- i. Additional contact information for the vendor, including full name, company name, email address, and telephone number;



Response



- ii. The CLIN template, if applicable, as completed and submitted by the vendor with a Unit Price and Total price (Quantity multiplied by the Unit Price) per line item, as well as a Grand Total price for all line items;

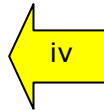
Line Item Description	Quantity	Unit Price	Total
Line Item #1	1000	2.50	2,500.00
Grand Total:			2,500.00

- iii. A "Documents" section at the bottom where the user can view any file(s) submitted by the vendor as part of the response, including the file name, file size, and file description, if available; to open a file, the user can click on the "View" icon or the file name;



- iv. A right side bar displaying the date the response was created, the date it was modified, and the vendor's full name.

RESPONSE INFO
 Created: February 21, 2009 10:12 pm
 By: [Micki Vendor](#)
 Modified: February 21, 2009 10:38 pm
 By: [Micki Vendor](#)

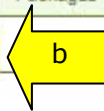


- b. The "Notes" sub-tab allows the user to enter and save notes for each electronic response submission:
 - i. If there are no notes saved, the system will indicate "No Items Found;"
 - ii. To create a note, click on the "Add New Note" button located at the bottom of the page;

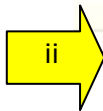
Notice Information Packages **Bids/Responses** Interested Vendors

Core **Notes**

Keywords:



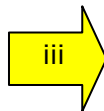
 No items found



- iii. The system provides a text field where the user can enter in "Note Information;"

Notice Information Packages **Bids/Responses** Interested Vendors

Core **Notes**



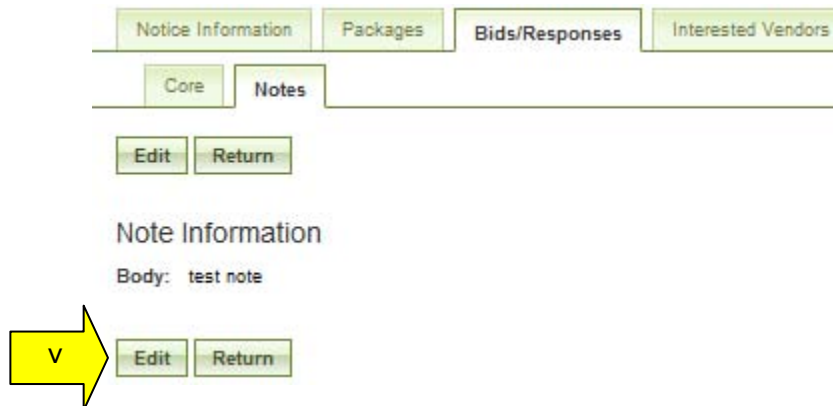
Note Information

Body*

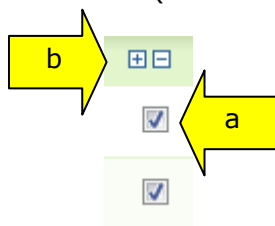
1. "Submit" saves the text entered and returns the user to the main "Notes" sub-tab listing all saved entries;
 2. "Save" saves the text entered and keeps the user within that particular note for review;
 3. "Return" does not save the text entered and returns the user to the main "Notes" sub-tab listing all saved entries.
- iv. A user can view and/or edit a note entry at any time by opening the "Notes" sub-tab within a response and clicking on the "View" icon next to the desired note.



- v. The user can review the "Note Information" and make changes (or delete the note) by clicking on the "Edit" button; otherwise, the user clicks "Return" to go back to the main list of "Notes" for that response.



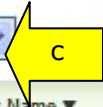
- V. A user can download all or a select number of vendor responses into a Zip file by following these steps:
- a. Within the "Bids/Responses" tab of a particular notice, select the responses to be downloaded using the checkboxes next to each response;
 - b. Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;



- c. Next, click on the down arrow next to "Batch Options" and select the "Download Zip" option;

Notice Information Packages **Bids/Responses** Interested Vendors

Keywords:

Batch Options  of 2

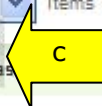
Download Zip
Mail

<input type="checkbox"/>		Last Name ▼	First Name ▼	Contractor ▼
<input checked="" type="checkbox"/>		Vendor	Micki	FBO Test Vendor
<input checked="" type="checkbox"/>		Vendor02	Micki	Test Vendor 2

- VI. Users can also send email messages to selected vendors by following these steps:
- Within the "Bids/Responses" tab of a particular notice, select the response(s) for which you would like to send an email message to the associated vendor(s) using the checkboxes next to each response;
 - Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;
 - Next, click on the down arrow next to "Batch Options" and select the "Mail" option;

Notice Information Packages **Bids/Responses** Interested Vendors

Keywords:

Batch Options  Items 1-2 of 2

Download Zip
Mail

<input type="checkbox"/>		Last Name ▼	First Name ▼	Contractor ▼	DUNS ▼
<input checked="" type="checkbox"/>		Vendor	Micki	FBO Test Vendor	
<input checked="" type="checkbox"/>		Vendor02	Micki	Test Vendor 2	

- The system opens "Mail Wizard" sub-tab which provides instructions for creating an email message to the vendors selected in the previous step:
 - Enter the Subject of the email message;
 - The system will automatically enter in the email addresses on file for the vendor response(s) selected by the user;
 - If desired, enter the email address(es) for the people who should be carbon copied (Cc) and/or blind copied (Bcc) on the email message;
 - Use the yes/no radio buttons to indicate if the message should be formatted using HTML;



STEP 1: Review/Edit Message
 Please 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.

i **Subject*:**
 Enter the subject of the email message.

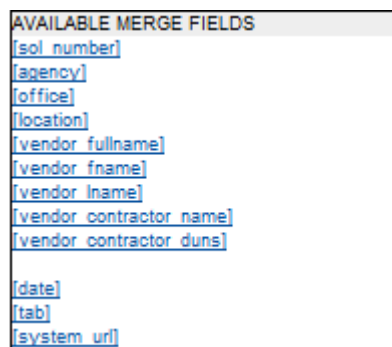
ii **From:**
 Please enter the e-mail address which will be used in the from field.
 m.....n@s.....com

iii **Cc:**
 Address(es) who should be carbon copied

iii **Bcc:**
 Address(es) who should be blind copied

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

- v. Enter the message body, including any "merge fields" which are identified in the right side bar; the user can either type the identifier (including the brackets) directly into the text body, or click on the blue text in the side bar to insert the information wherever needed.




- vi. The user is able to select one or more files from their computer to be included as part of the message.
 1. Click on the "Browse" button to select a file;
 2. Use the radio buttons to indicate the method for sending the file, either as an attachment in the email message, or as a link to the file;
 3. The user can delete attachments at any time using the "Delete Attachment" button (note, this action takes place immediately, independent of submitting the form);

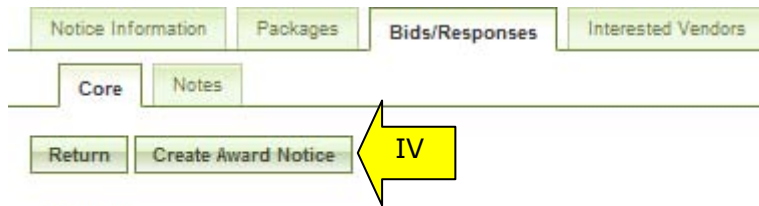
4. The user can attach more files using the "Add Additional Attachments" button;

- vii. "Cancel" does not save the message and returns the user to the main "Bids/Responses" tab;
- viii. "Next" moves the user to step two, "Review Recipients" where the system will allow the user to review the list of recipients, and make any necessary changes

- ix. "Cancel" does not save the message and returns the user to the main "Bids/Responses" tab;
- x. "<prev" returns the user to step one, "Review/Edit Message;"
- xi. "Send Messages" begins the mailing process. **Note, this action cannot be reversed.**

5.5 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:
 -  (see section 4.3.)
- 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.
- IV. If the Bid Module is enabled for a user's notice and there are vendor electronic responses submitted, the user can also initiate the award process directly from the "Core" sub-tab of an electronic response by clicking on the "Create Award Notice" button. (Note, this button will only be present if the notice is eligible for award.)



Response

- V. After clicking "Create Award Notice," the system will take the user to step two of the award process, "Notice Details," where the following fields are pre-populated:
 - a. Title;
 - b. Classification Code and NAICS Code;
 - c. Contract Award Date;
 - d. Contractor Awarded Name and Address;
 - e. Primary and Secondary Point of Contact Information;
 - f. Existing Description.
- VI. See section 4.3 for detailed information on the steps required to continue processing an award.

5.6 Cancel Notice

See section 4.4.

5.7 Deletion of Draft Notices

See section 4.5.

5.8 Archive Notices

See section 4.6.

5.9 Unarchive Notices

See section 4.7.

5.10 Print Notices

See section 4.8.

5.11 Review Interested Vendors List

See section 4.9.

6 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.

6.1 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 tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Below the tabs is a search bar with a 'Keywords' field, a 'More' button, and a 'Go' button. A table displays 'Results: Items 1-4 of 4' with columns for 'Actions', 'Sol/Ref #', 'Created on', and 'Released'. The 'Released' column contains a red 'X' for the first two items and dates for the last two. At the bottom of the table is a button labeled 'Add New Non-FBO Solicitation'.

Actions	Sol/Ref #	Created on	Released
	32608	Mar 26, 2008 2:29 pm	X
	58979	Mar 25, 2008 6:08 pm	X
	8a7def097	Mar 25, 2008 6:09 pm	Apr 11, 2008 9:30 am
	deletion	Apr 15, 2008 9:27 am	Apr 15, 2008 9:27 am

- 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](#)

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

[New Non-FBO Solicitation]

1 Details * indicates a required field

2 Packages

3 Submit

Solicitation Details

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:

- 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

FEDBIZOPPS.GOV Federal Business Opportunities

Home Procurement Notices Documents/Links Agencies Organizations Buyers My Account

User Guide Help Desk

[New Non-FBO Solicitation]

1 Details

2 **Attach Packages**

3 Review and Submit

Attach Packages * indicates a required field

Package #

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, Vendor must submit [form DD2245](#).

yes no

Explicit Access*

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

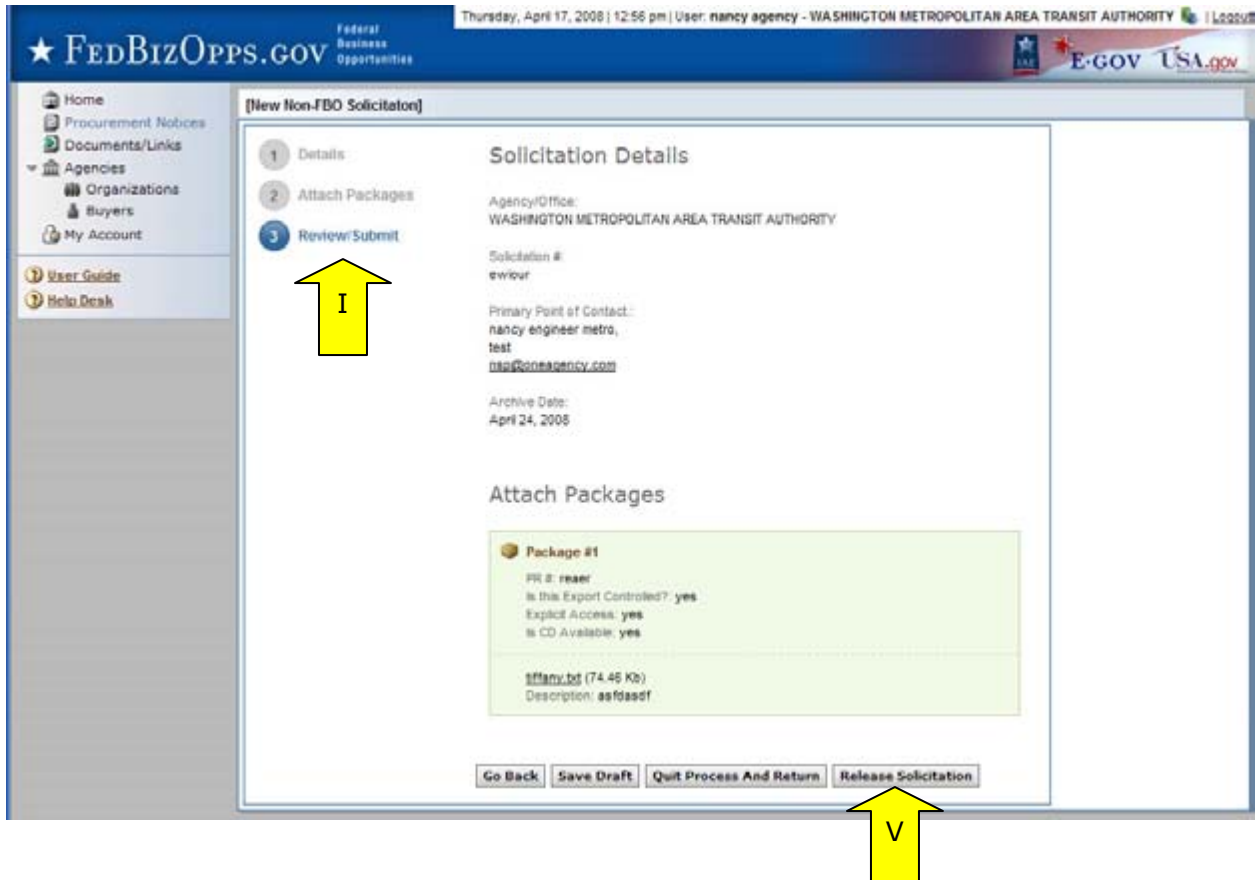
yes no

Is CD Available*

yes no

File #!

- 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.



- 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 interface for a Non-FBO Solicitation. The page title is "Non-FBO Solicitation: deletion". The breadcrumb trail includes "Procurement Notices", "Drafts", "Archived", and "Non-FBO Solicitations". The "Details" tab is selected, and there are buttons for "Unrelease Solicitation", "Return", and "Archive".

Solicitation Details

- 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.svmplcity.com/feteds/deletion>

A yellow arrow labeled "I" points to the Vendor Link. Below the details is the "Attach Packages" section, which shows "Package #1" with the following attributes:

- PR #: deletion
- Is this Export Controlled?: no
- Explicit Access: yes
- Is CD Available: no

A file named "testing.doc" (24.50 Kb) with the description "test" is listed. At the bottom of the details section, there are buttons for "Unrelease Solicitation", "Return", and "Archive".

Non-FBO Solicitation Info

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

6.2 Un-release Non-FBO Secure Document Link

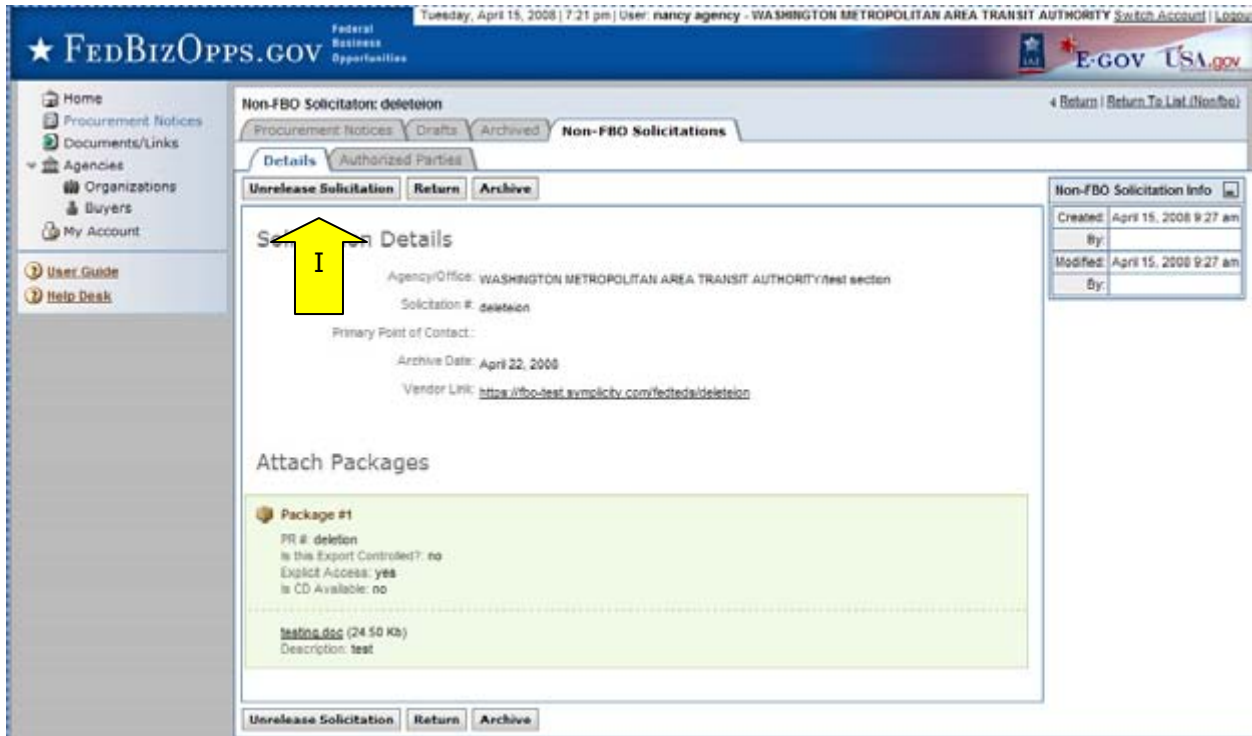
- I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional. Vendors trying to view the link of an unreleased Non-FBO solicitation will receive the following error message:
NOTE: The Secure Documents link (formerly FedTeDS) you are trying to access cannot 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 unrelease 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
	8a7df097	Mar 25, 2008 6:09 pm	Apr 11, 2008 9:30 am
	deletion	Apr 15, 2008 9:27 am	Apr 15, 2008 9:27 am

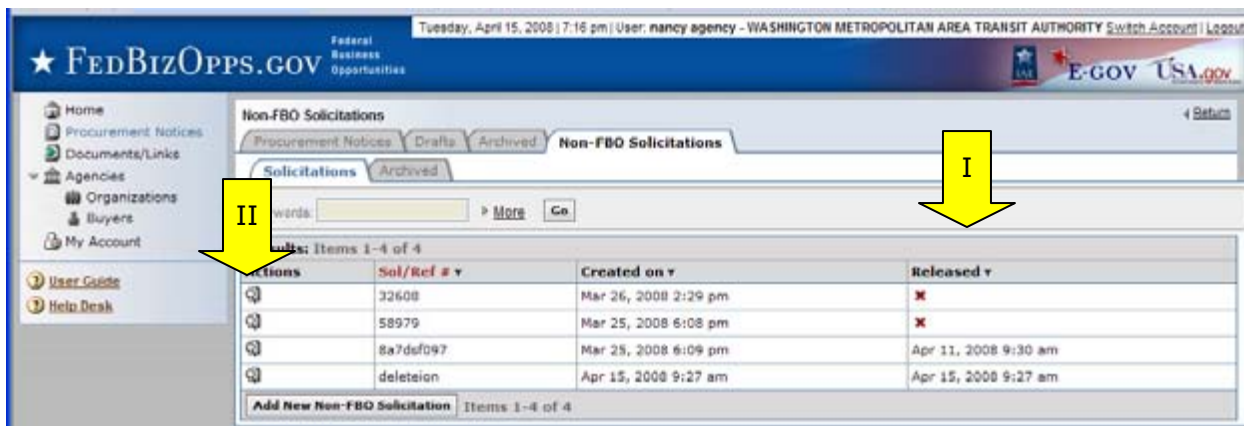
Yellow arrow 'II' points to the 'Released' column. Yellow arrow 'III' points to the 'Actions' column.

- 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



6.3 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.



- 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 | Log

FEDBIZOPPS.GOV Federal Business Opportunities

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Non-FBO Solicitation: ewlour

- 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 #:
ewlour

Primary Point of Contact:
nancy.engineer.metro,
test
nso@metraagency.com

Archive Date:
April 24, 2008

Attach Packages

Package #1

File #: reaser
Is this Export Controlled?: yes
Explicit Access: yes
Is CD Available: yes

[reaser.txt](#) (74.46 Kb)
Description: asdfasdf

Go Back Save Draft Quit Process And Return Delete
Release Solicitation

7 Manage Document Packages

(outside context of FBO Notice Creation)

7.1 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 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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Documents/Links [Return](#)

Packages Authorized Parties

Keywords: [More](#)

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
Download View: More docs				
0002kias	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	alphanum	Apr 16, 2008 3:58 pm	Apr 16, 2008
Download View: image file				
	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	1258264	Mar 26, 2008 4:06 pm	Mar 26, 2008
Download View: secure doc				

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

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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.

Thursday, April 17, 2008 | 9:29 am | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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[New Documents Links]

1 Details
2 Upload Files
3 Review/Submit

Files / Attachments * indicates a required field

File #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.

Browse... Large Upload

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

Description*
Enter in a short description for this filelink.

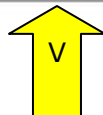
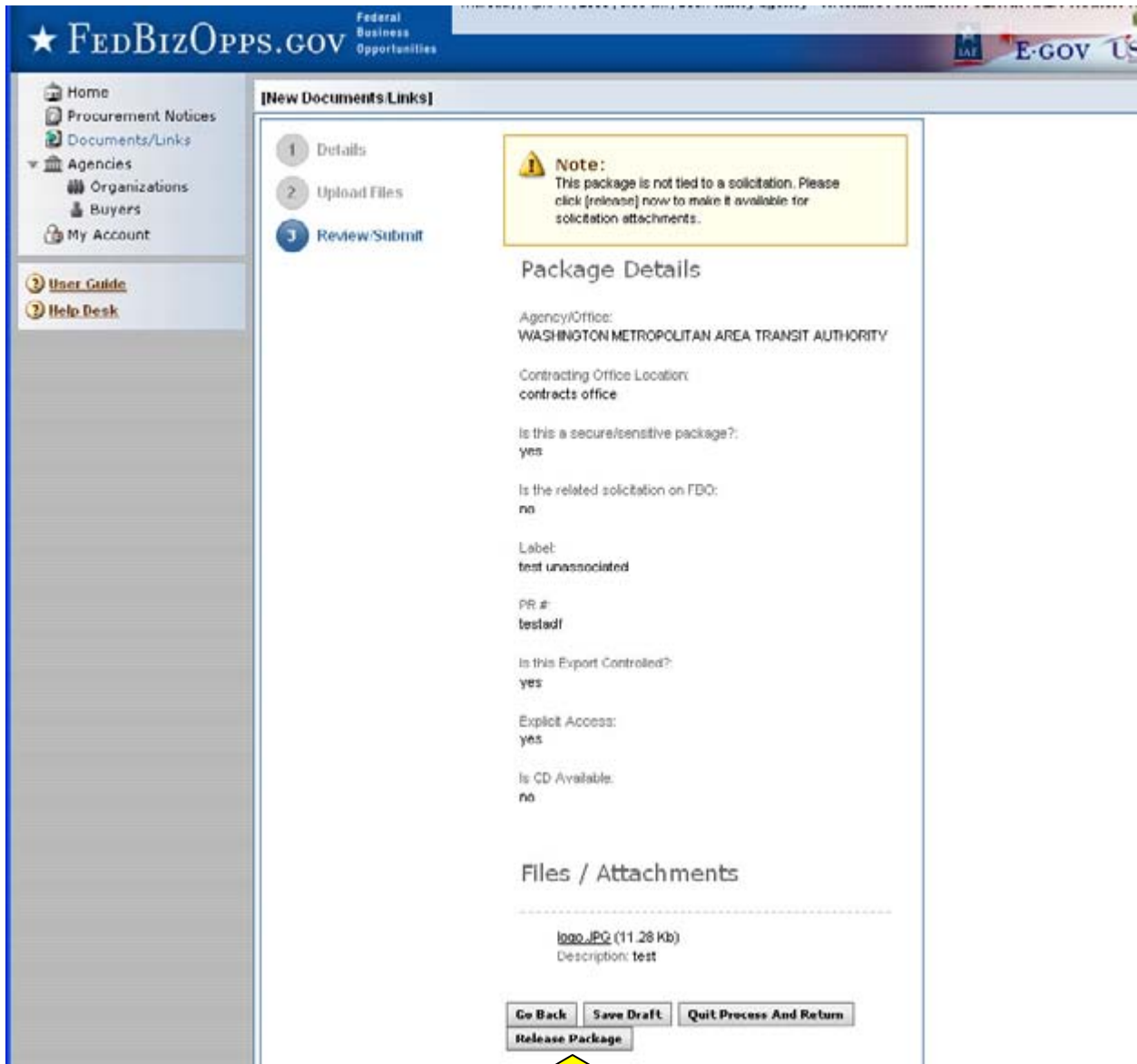
Remove This File

Add Another File To This Package

Go Back Save Draft Quit Process And Return
Proceed & Review

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.



7.2 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

FEDBIZOPPS.GOV Federal Business Opportunities

Documents/Links

Packages Authorized Parties

Keywords: [More](#)

Items 1-20 of 61

Label / PR #	Type	Solicitation	Created on	Posted On
123d36	Other (Draft RFPs/RFIs, Responses to Questions, etc...)	123d56d36	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
123aa	Other (Draft RFPs/RFIs, Responses to Questions, etc...)	[Unassigned]	Mar 25, 2008 4:02 pm	Mar 25, 2008

Download/View: [More stuff](#)

View: [testaa](#) [testaa](#)

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

FEDBIZOPPS.GOV Federal Business Opportunities

test414

Details Audit Trail

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

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

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

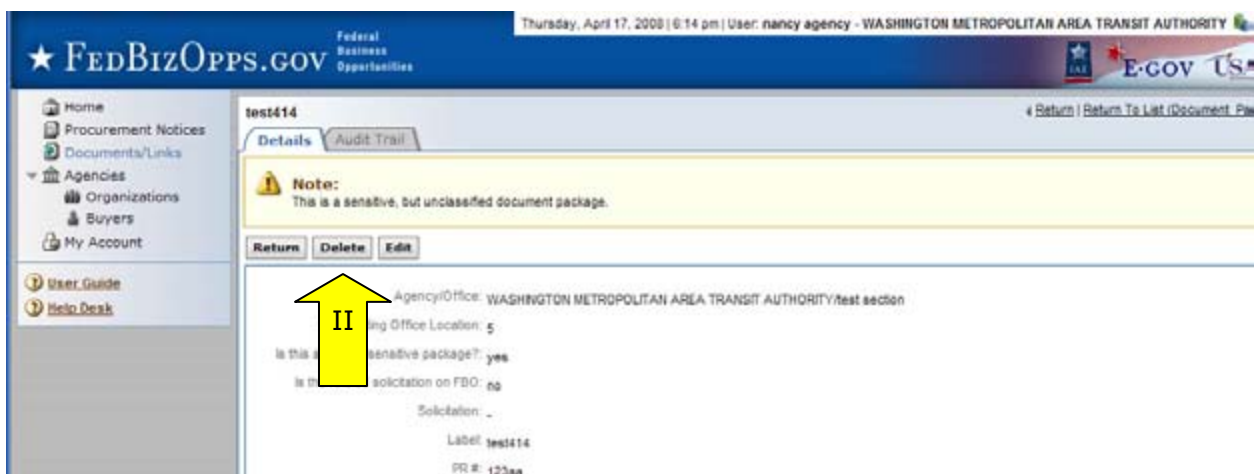
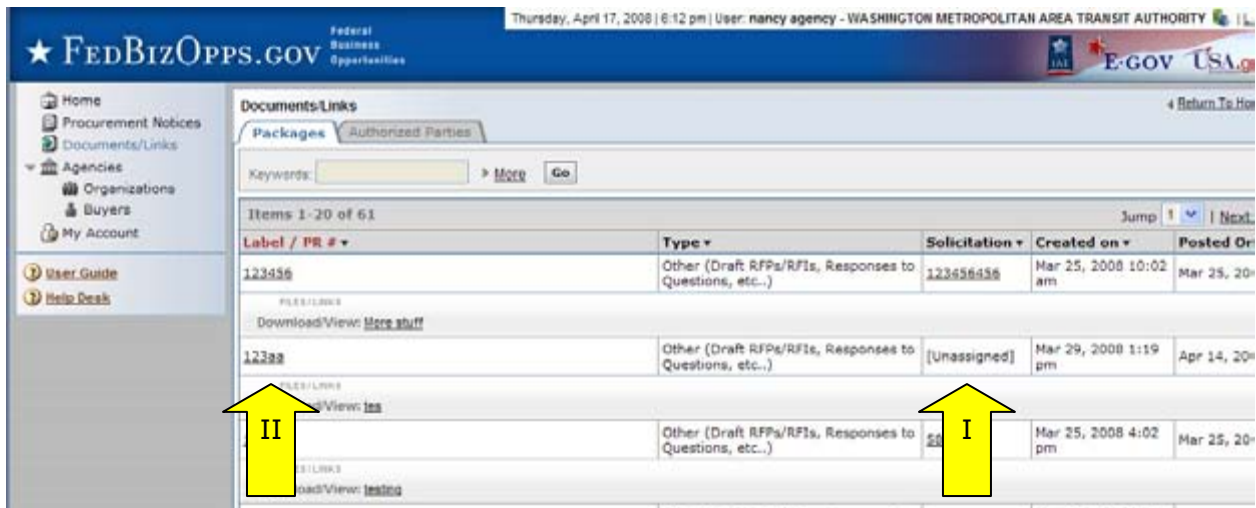
- I. After edit is selected, user see message indicating why edits are allowed, and will need to confirm the desire to make edits to the package.



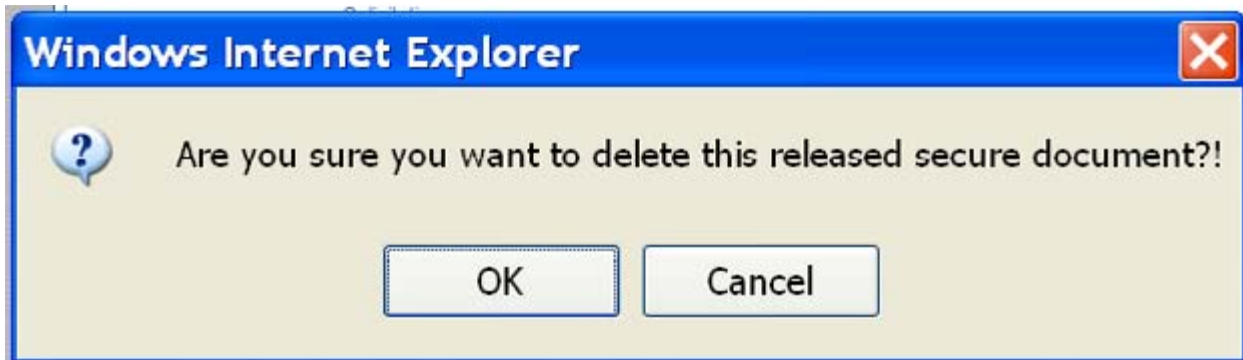
- II. Users will be taken to step one of document creation and can progress as if the document had been previously saved as draft. See above for details on notice creation.

7.3 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.



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





7.4 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.

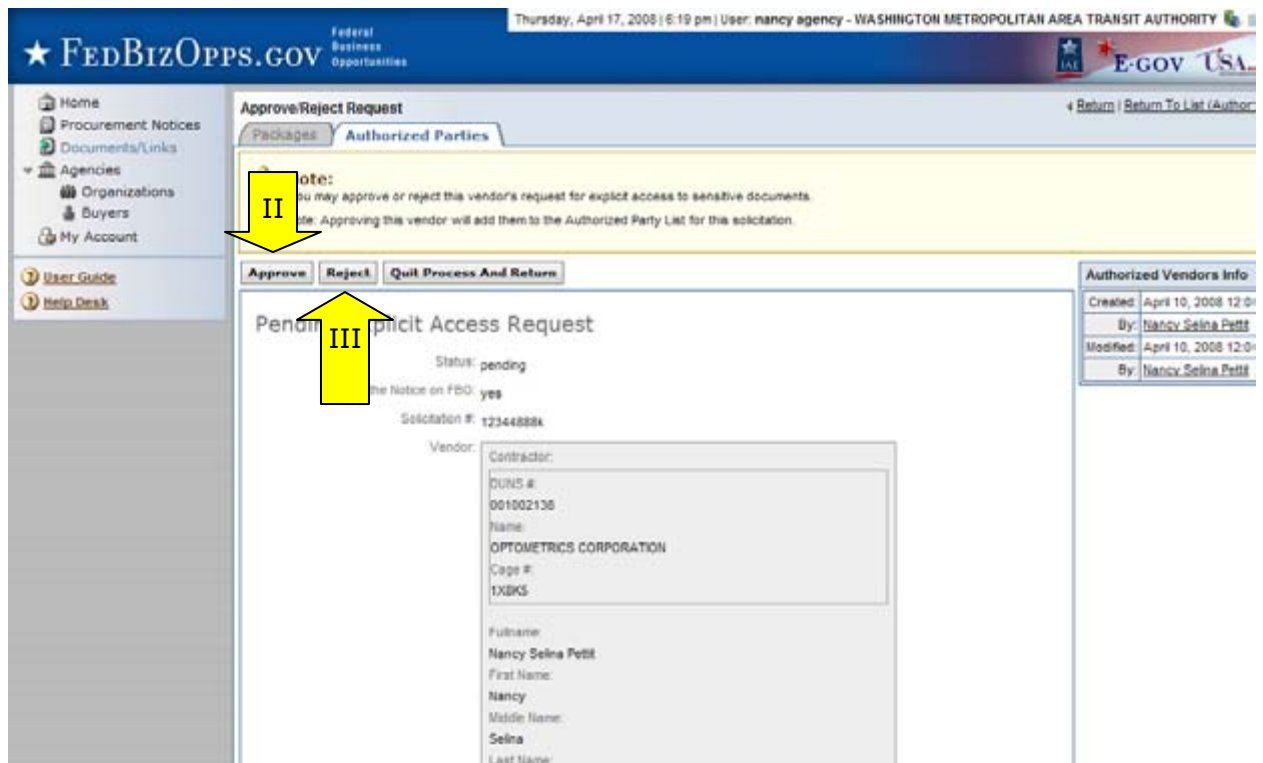
The screenshot displays the FEDBizOpps.gov home page for a user named 'nancy agency' at the 'WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The page is dated Thursday, April 17, 2008, at 6:17 pm. The main content area is titled 'Home' and features a 'Pending Actions' section with a red warning icon. Under 'Pending Actions', there are two items: '2 Explicit Access Requests' and '0 Agency Cost Registrations'. A yellow arrow with the letter 'I' points to the 'Explicit Access Requests' link. To the right, the 'Statistics' section shows various counts: 30 Active Procurement Notices, 3 Archived Procurement Notices, 9 Active Non-FBO Solicitations, 2 Archived Non-FBO Solicitations, 50 Active Document Packages, and 25 Agency Users. Below the statistics is an 'Account Switcher' section with a dropdown menu set to 'WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. At the bottom, there is an 'Announcements' section stating 'There are no announcements at this time.' The left sidebar contains navigation links for Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk.

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

The screenshot shows the FEDBizOpps.gov interface. At the top, it displays the date and time (Thursday, April 17, 2008 | 6:18 pm) and the user's role (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY). The main navigation menu includes Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The current page is titled 'test414' and is under the 'Authorized Parties' tab, which is divided into 'Pending Requests', 'Authorized', and 'Rejected Requests'. A search bar with a 'Go' button is present. Below the search bar, a table displays the results for 'Items 1-2 of 2'. The table has columns for 'Actions', 'Sol/Ref #', 'Last Name', 'First Name', 'Email', 'Contractor', 'DUNS', and 'Cage #'. The first row shows a review icon in the 'Actions' column, which is highlighted by a yellow arrow labeled 'I'. The second row shows a 'deletion' icon in the 'Actions' column.

Actions	Sol/Ref #	Last Name	First Name	Email	Contractor	DUNS	Cage #
	123456789	Pettit	Nancy	nancy.export@symplicity.com	OPTOMETRICS CORPORATION	001002138	1X8K5
		Pettit	Nancy	nancy.export@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.



- 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 16:20 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

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Reject Request
Packages Authorized Parties

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

Is the Notice on FBO: YES

Solicitation #: 12344566k

Vendor: Nancy Selina Pett (Vendor Associates: 147852963)

Rejection Note*: Please provide a reason for this rejection

Quit Process And Return Save And Send Rejection

Authorized Vendor
Created: April 10, 2008
By: Nancy E. Pett
Modified: April 10, 2008
By: Nancy E. Pett

7.5 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.

The screenshot shows the FEDBizOpps.gov interface. At the top, there is a navigation bar with the site logo and user information. Below this, a sidebar on the left contains various navigation links. The main content area features a breadcrumb trail and several tabs: 'Notice Information', 'Packages', and 'Interested Vendors'. Under 'Packages', there are sub-tabs for 'Authorized Parties', 'Pending Requests', and 'Rejected Requests'. A search box with a 'Go' button is present. Below the search box, a table displays the results for authorized parties. A yellow arrow labeled 'I' points to the 'Authorized Parties' tab.

Actions	Last Name	First Name	Email	Contractor	DUNS	Cage #
	export	nancy	test-17@symlicity.com, test-1@symlicity.com, test-2@symlicity.com	nancy's import export	000002222	XXXXY
	Petit	Nancy	nancyexport@symlicity.com	OPTOMETRICS CORPORATION	001002130	1X8K5
	Vendor	Alan	test10@symlicity.com, csest0@yahoo.com, blmnso@gmail.com	LOEB, H CORP	001001668	3X4W6

At the bottom of the table, there is a link labeled 'Add Authorized Party' and a note 'Items 1-3 of 3'.

7.6 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 FedBizOpps.gov website interface. The left navigation pane includes links for Home, Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. A yellow arrow labeled 'II' points to the 'Documents/Links' link. The main content area is titled 'Documents/Links' and has two tabs: 'Packages' and 'Authorized Parties'. Below the tabs is a search area with the following fields and options:

- Keywords: [Less](#)
- Secure: yes no
- Type:
- Posted Date: to
- Posted: yes no

Below the search area is a table of document items. The table has the following columns: Label / PR #, Type, Solicitation, Created on, and Posted On. The table shows 42 items in total, with the first 20 displayed. The first four items are:

Label / PR #	Type	Solicitation	Created on	Posted On
122456	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	123456456	Mar 25, 2008 10:02 am	Mar 25, 2008
1239a	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008
14705	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 main content area is titled "Audit Trail - PR # 123456: 123456456" and features a search box and a "Go" button. Below the search box is a table with the following 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

A yellow arrow labeled "III" points to the review icon in the Actions column of the table.

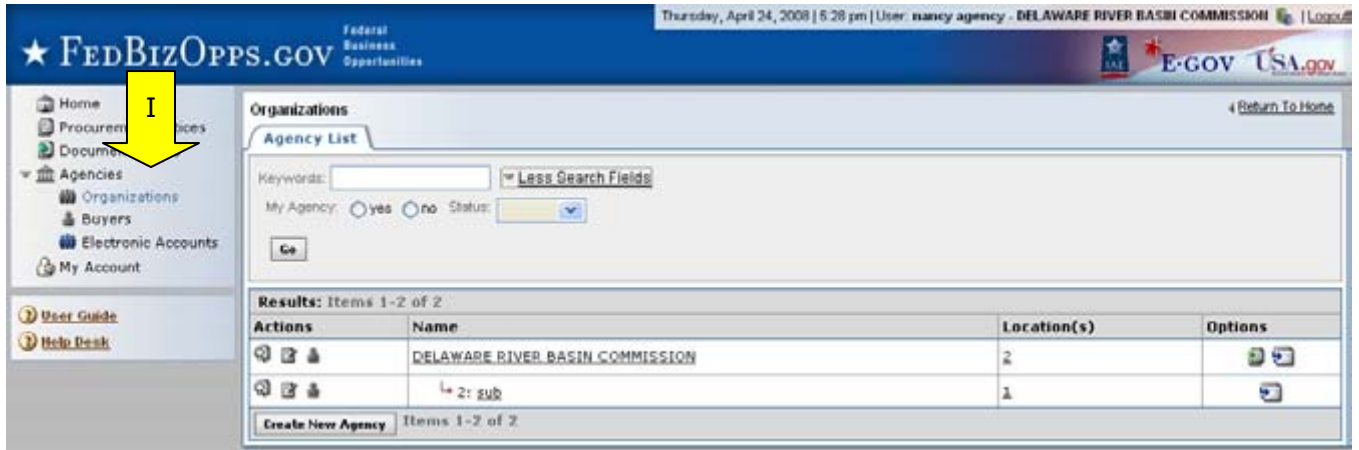
- I. The "audit trail" record details the specifics of the secured, but unclassified, document review.
- II. "Return" closes the record.

The screenshot displays the FEDBizOPPS.gov interface. At the top, the header includes the site name, a navigation menu, and the user's session information: 'Tuesday, April 15, 2008 | 6:05 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The main content area is titled 'Audit Trail - PR # 123456: 123456456'. A yellow arrow labeled 'I' points to the 'Audit Trail' tab. Below the tab, there is a 'Return' button. The central part of the page shows a 'Secure Package Log' for PR # 123456, detailing a download action for a file named 'fbo buyer guide1.pdf' by a contractor named 'Dagostin Incorporated'. A yellow arrow labeled 'II' points to the 'Return' button at the bottom of the log entry. On the right side, there is a 'Secure Document Log Info' table.









Secure Document Log Info	
Created:	March 25, 2008 10:11 am
By:	tony_wetzler
Modified:	March 25, 2008 10:11 am
By:	tony_wetzler

8 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.




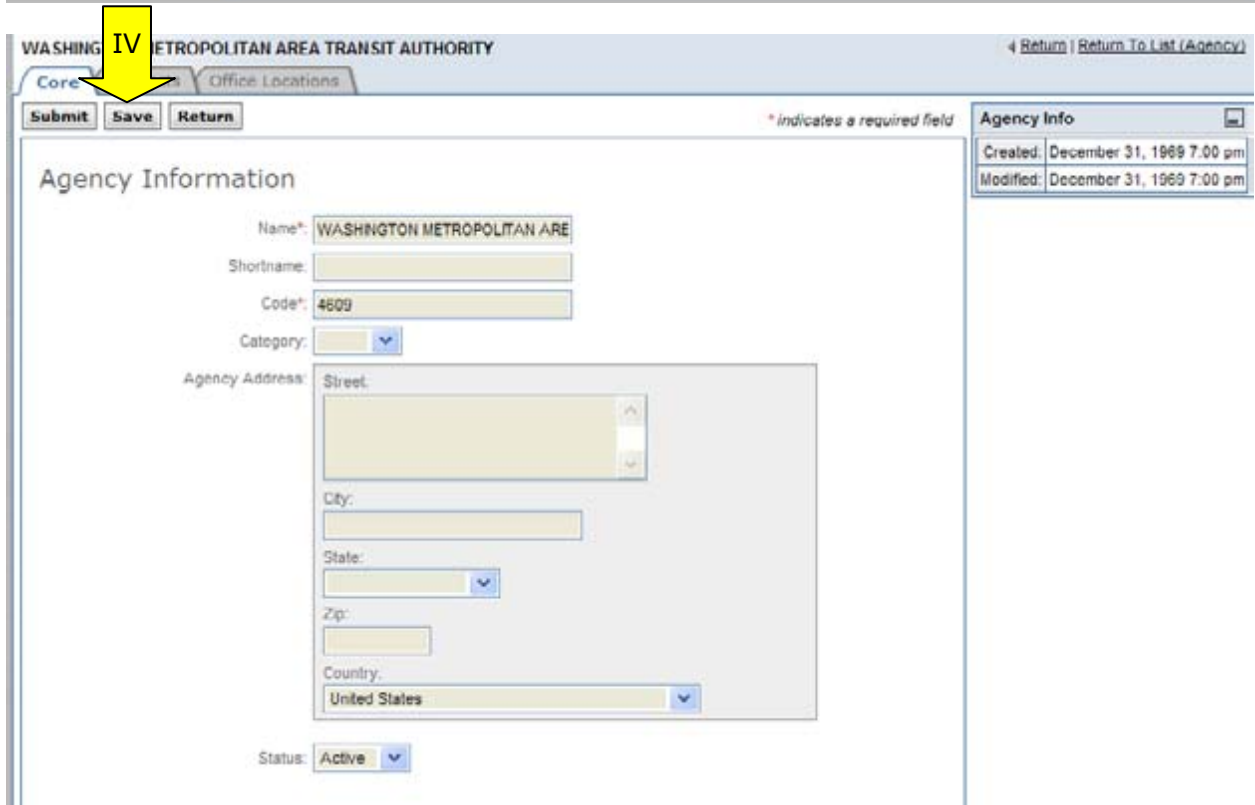
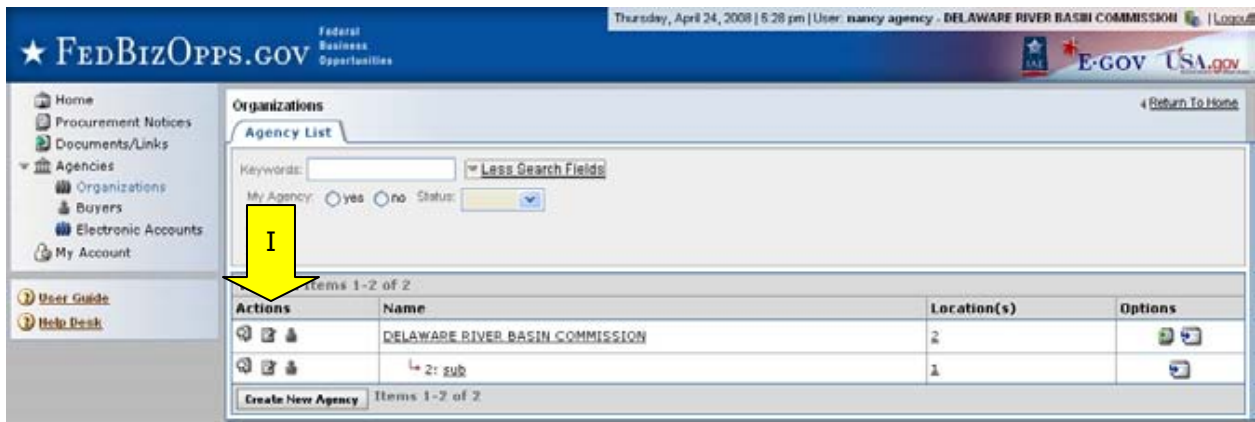
The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, the text "Federal Business Opportunities", and the date "Thursday, April 24, 2008 | 5:28 pm". The user is logged in as "nancy agency - DELAWARE RIVER BASIN COMMISSION". The left sidebar contains a navigation menu with items: Home, Procurement Processes, Documents, Agencies (expanded), Organizations, Buyers, Electronic Accounts, and My Account. A yellow arrow labeled "I" points to the "Organizations" link under the "Agencies" category. The main content area is titled "Organizations" and "Agency List". It features a search box with "Keywords:" and a "Less Search Fields" link. Below the search box are radio buttons for "My Agency: yes no" and a "Status:" dropdown menu. A "Go" button is present. The results section shows "Results: Items 1-2 of 2" and a table with columns: Actions, Name, Location(s), and Options.

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


At the bottom of the results section, there is a "Create New Agency" button and the text "Items 1-2 of 2".

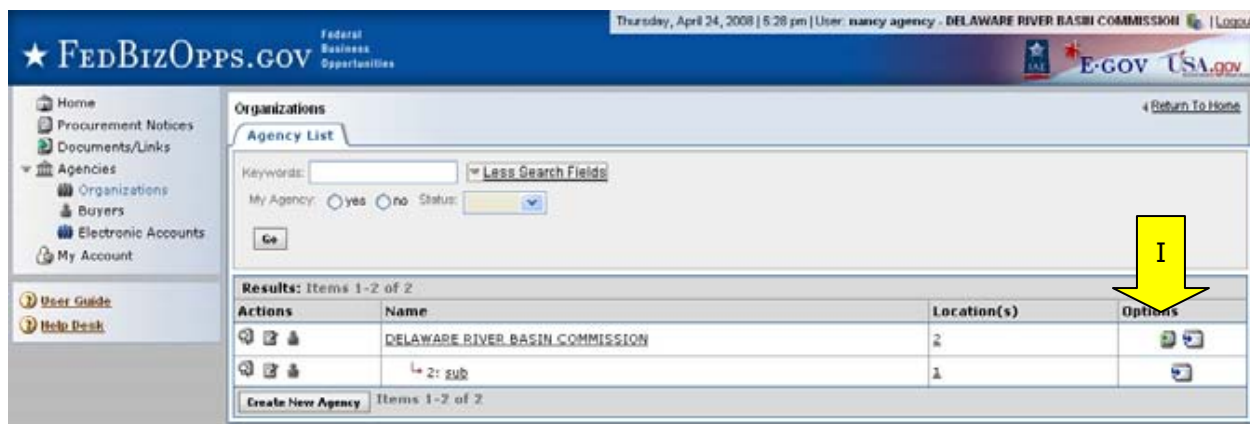
Edit Agency Record

- 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 user's 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.










8.1 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 main content area is titled "Organizations" and contains an "Agency List" section. Below the search filters, there is a table with the following data:

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

A yellow arrow labeled "I" points to the "Options" column of the first row in 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 user's 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

Submit Save Return * indicates a required field

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

Default:


Status:

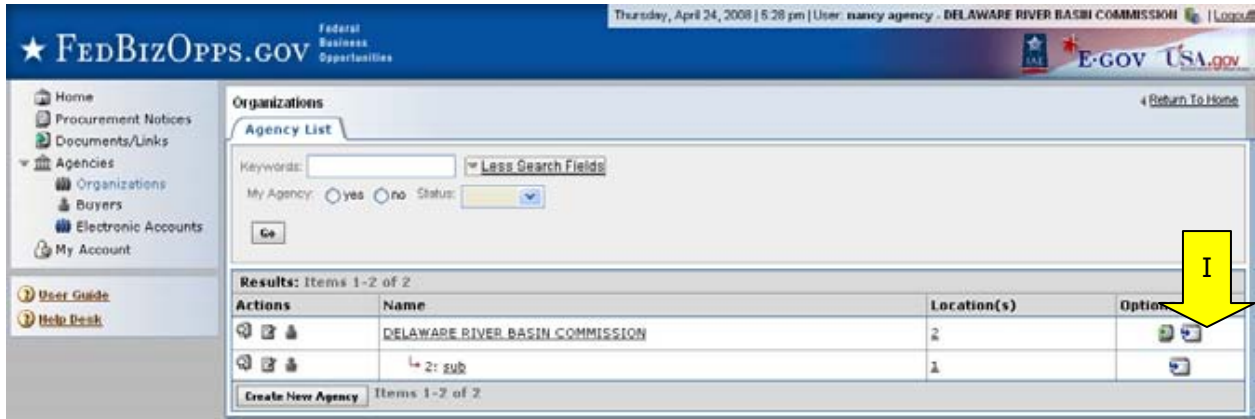
Logo

You may upload a logo for this agency/office













Logo: Upload:

8.2 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.



The screenshot shows the 'Organizations' section of the FEDBIZOPPS.GOV website. It includes a search bar with a 'Less Search Fields' button and a 'Go' button. Below the search bar is a table with the following data:

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

A yellow arrow labeled 'I' points to the 'add icon' in the 'Options' column of the first row.

- 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 user's 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 15:33 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout

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[New Office] for DELAWARE RIVER BASIN COMMISSION
Core Contacts Offices Office Locations
Location Profile Contacts
Submit Save Return * indicates a required field

Office Location Information

Code*
Name*
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
Active: yes no

Submit Save Return

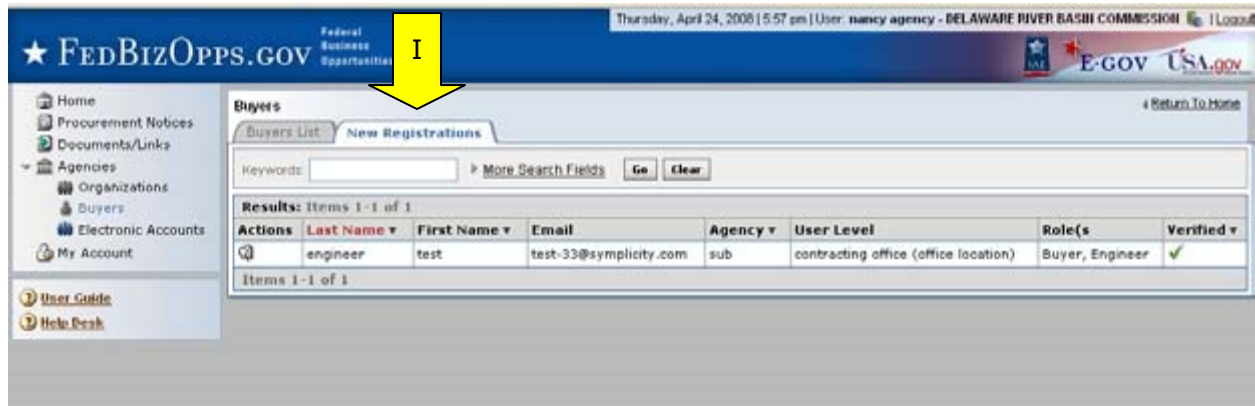
9 Manage Agency User Accounts

- I. Pending agency account requests that a 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. A secondary navigation bar features the "E-GOV USA.gov" logo. On the left side, there is a vertical menu with links for "Home", "Procurement Notices", "Documents/Links", "Agencies", "Organizations", "Buyers", "Electronic Accounts", and "My Account". Below this menu are "User Guide" and "Help Desk" links. The main content area is titled "Home" and contains several sections: "Pending Actions" with a red warning icon and a yellow arrow pointing to a list item "1 Agency Contact Registrations"; "Quicklinks" with options like "Create Notice", "Modify/Amend Notice", "Create Award", "Cancel Notice", and "Upload New Documents/Links"; "Statistics" showing counts for "Active Procurement Notices", "Archived Procurement Notices", "Active Non-FBO Solutions", "Archived Non-FBO Solutions", "Active Document Packages", and "Agency Users"; "Account Switcher" with a dropdown menu currently set to "DELAWARE RIVER BASIN COMMISSION" and a tip about switching accounts; and "Announcements" which states "There are no announcements at this time."

9.1 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.



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 24, 2008 | 5:57 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION | Logout'. A yellow arrow labeled 'I' points to the 'New Registrations' tab in the 'Buyers' section. Below the search bar, a table displays search results. The table has columns for Actions, Last Name, First Name, Email, Agency, User Level, Role(s), and Verified. One result is shown for 'engineer' with a verified status.

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	✓

- 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.

A screenshot of a web application interface showing a "Buyer User Registration Form". The form contains the following fields:

- Fulname: nancy engineer metro
- Title: test
- Email Address: nnc@oneagency.com
- Account Info:
 - Agency: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
 - User Level: agency
 - User Roles: Buyer
- Username: testnancy

At the top and bottom of the form area, there are buttons: "Approve Registration", "Reject", "Edit", and "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

On the left side of the interface, there are links for "User Guide" and "Help Desk".

- 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.

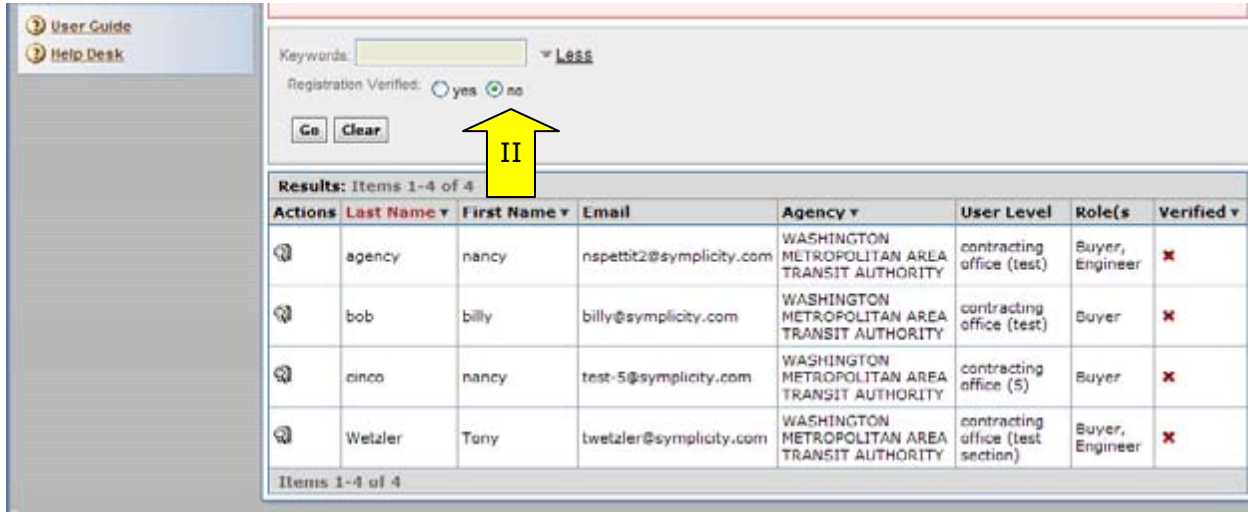
The screenshot displays the 'Buyer User Registration Form' interface. At the top left, there are navigation links for 'User Guide' and 'Help Desk'. The form title is 'Buyer User Registration Form'. At the top, there are buttons for 'Save Changes', 'Cancel Edits', and 'Cancel'. A note indicates that an asterisk (*) denotes a required field. The form contains the following fields and options:

- Fullname*: nancy engineer metro
- Suffix: (empty)
- Title: test
- Email Address*: nsp@oneagency.com
- Account Info:
 - Agency*: WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY (dropdown menu)
 - User Level*: agency contracting office
 - Other Contracting Office*: (empty)
 - User Roles*: Agency Administrator Buyer Engineer Office Location Administrator
- Username*: testnancy

At the bottom left, a yellow arrow labeled 'II' points to the 'Save Changes' button. At the bottom right, there is an 'Agency Registration Info' box showing: Created: April 15, 2008 4:20 pm, Modified: April 15, 2008 4:24 pm, By: Admin Test. At the bottom of the form, there are buttons for 'Save Changes', 'Cancel Edits', and 'Cancel'.

9.2 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 labeled 'II' 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.

9.3 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.

The screenshot shows the FEDBIZOPPS.GOV interface. The left navigation menu includes 'Home', 'Procurement Notices', 'Documents/Links', 'Agencies', 'Organizations', 'Buyers', 'Electronic Accounts', and 'My Account'. The 'Electronic Accounts' link is highlighted with a yellow arrow labeled 'III'. The main content area shows a search bar and a table of agency users. The table has columns for Actions, Last Name, First Name, Office, Location(s), Email, Phone, Username, Logins, Last login, and Role(s). Two users are listed: 'agency' (bill) and 'registrant' (dew). Below the table is a 'Create New Agency User' button, which is highlighted with a yellow arrow labeled 'II'.

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	dew	DELAWARE RIVER BASIN COMMISSION/sub	office location	test44@us.gov		test4455	0	-	Buyer, Engineer

- 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 8:00 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 Agency User] [Return To Agency](#) | [Return To List \(agency_contact\)](#)

III 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 Electronic Accounts section.

yes no

II

- 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

FEDBIZOPPS.GOV Federal Business Opportunities

E-GOV USA.gov

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

[New User Account For nan murray] 4 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

FEDBIZOPPS.GOV Federal Business Opportunities

E-GOV USA.gov

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

nan murray: Account 4 Return | Return To List (Agency Contact)

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*: [text box]

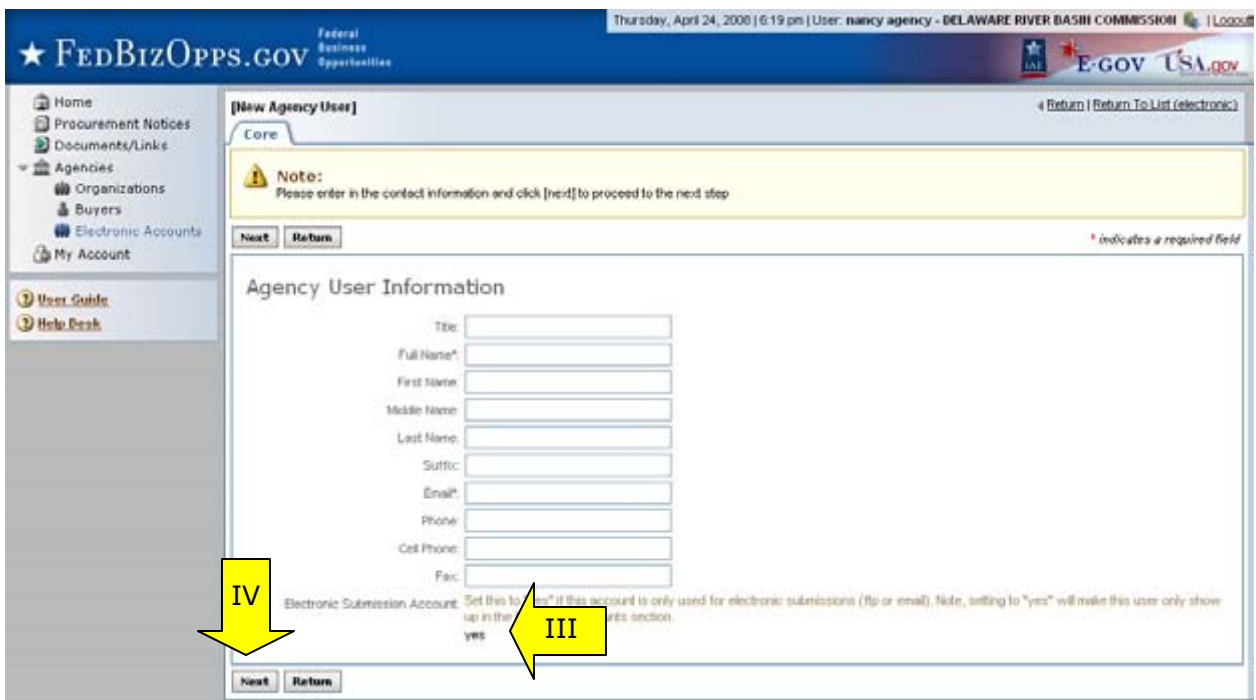
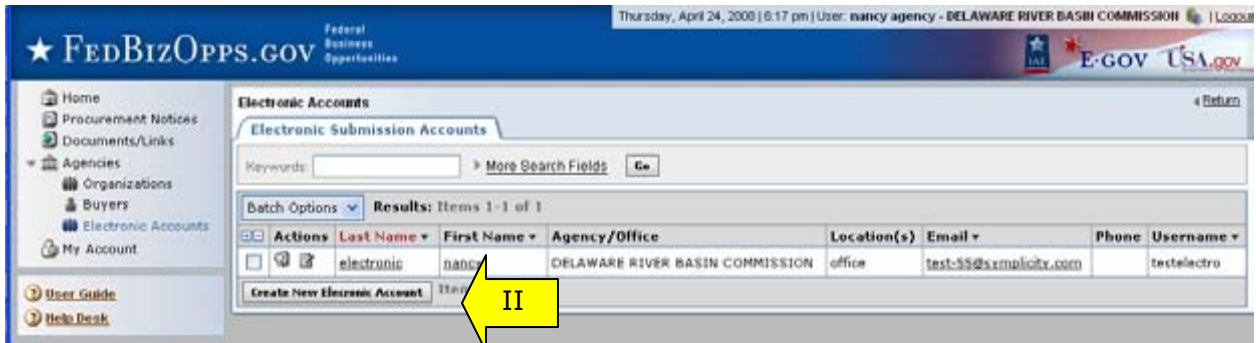
Enter New Password: [text box]

Verify Password: [text box]

Save Return

9.4 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."



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

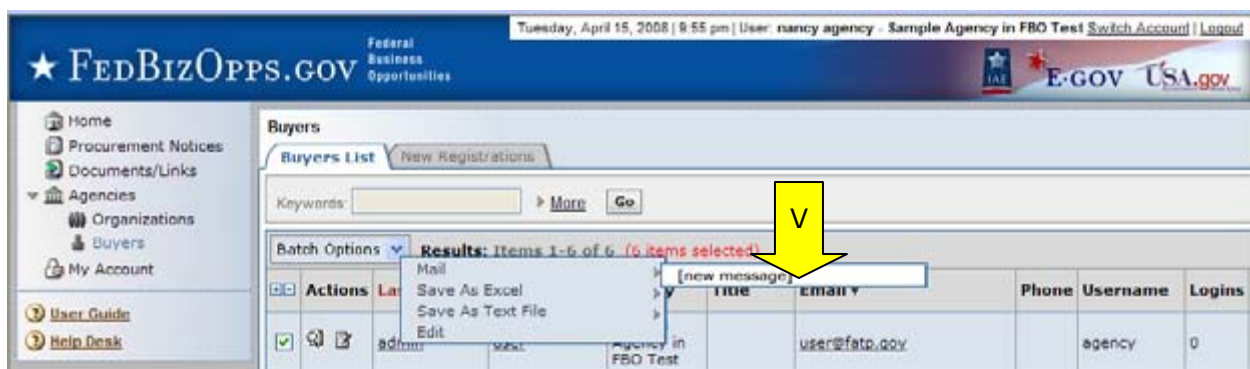
- II. Once the username is entered, and saved, the account will then appear on the electronic accounts list.

Buyers Info	
Created:	April 24, 2008 6:22 pm
By:	nancy.agency
Modified:	April 24, 2008 6:22 pm
By:	nancy.agency

- 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.

9.5 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.



- 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

FEDBIZOPPS.GOV Federal Business Opportunities

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

User Guide | Help Desk

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

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.

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

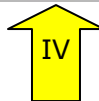
Send Copy To: Address(es) to receive a copy of the first message sent

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

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

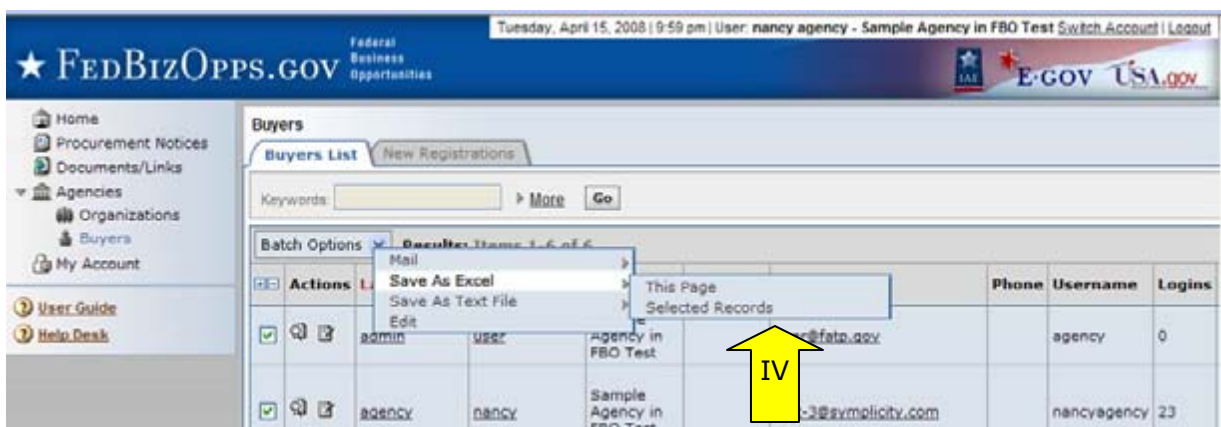
- I. Next the user will be given a chance to review the list of recipients for the message.
- II. "Prev" returns the user to the message composition step of the process.
- III. "Cancel" cancels the operation. Note, batch selections are not cleared with cancel.
- IV. "Send Message" sends the message to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

The screenshot shows the FedBizOpps.gov website interface. The top navigation bar includes the logo, the text 'Federal Business Opportunities', and the date/time '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 in 'STEP 2: Review Recipients'. It displays a list of email addresses: Dudley@saft.warehouse.gov, test-3@simplicity.com, Billy@saft.gov, nan@gov.agency.com, Suzie@SAFT.gov, and user@fapo.gov. Below the list is a 'remove selected recipients' button. A 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 are three buttons: 'cancel', '< prev', and 'Send Messages'.



9.6 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.

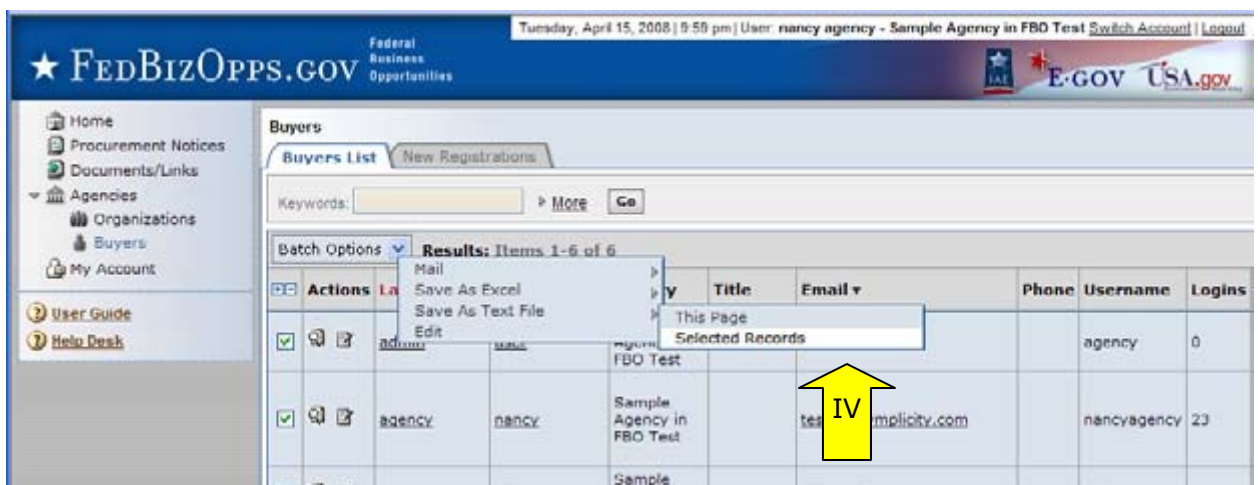
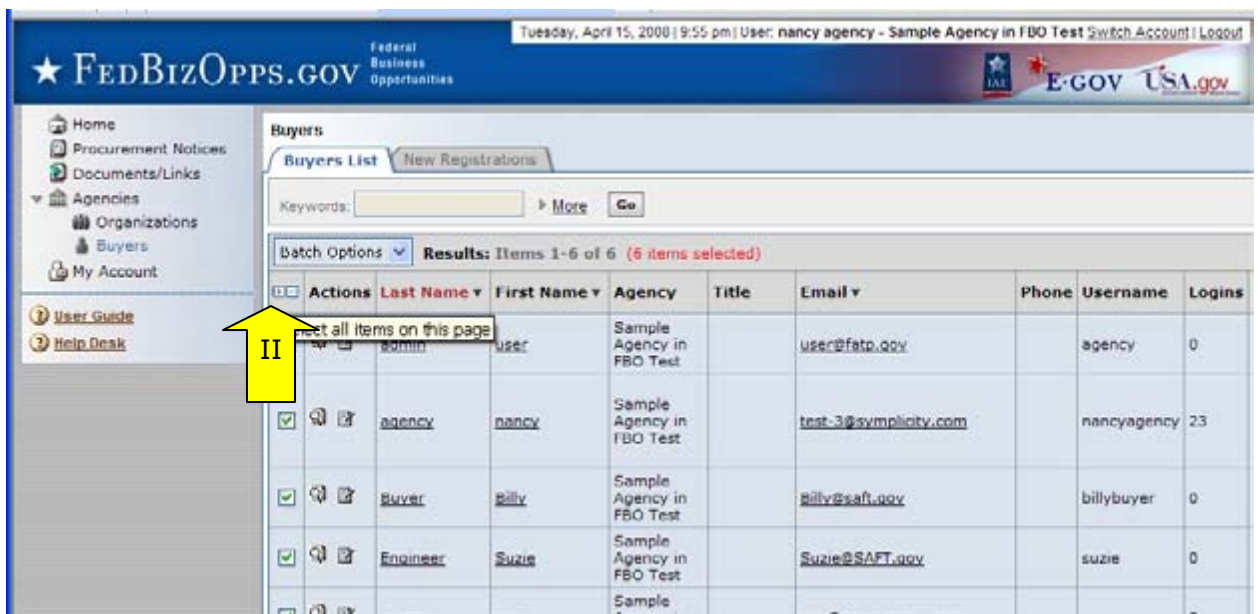


- IV. Follow your browser prompts to open or save as excel file.
- V. System will create excel file with select fields for the buyer accounts selected.

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

9.7 Batch "Save to Text File"

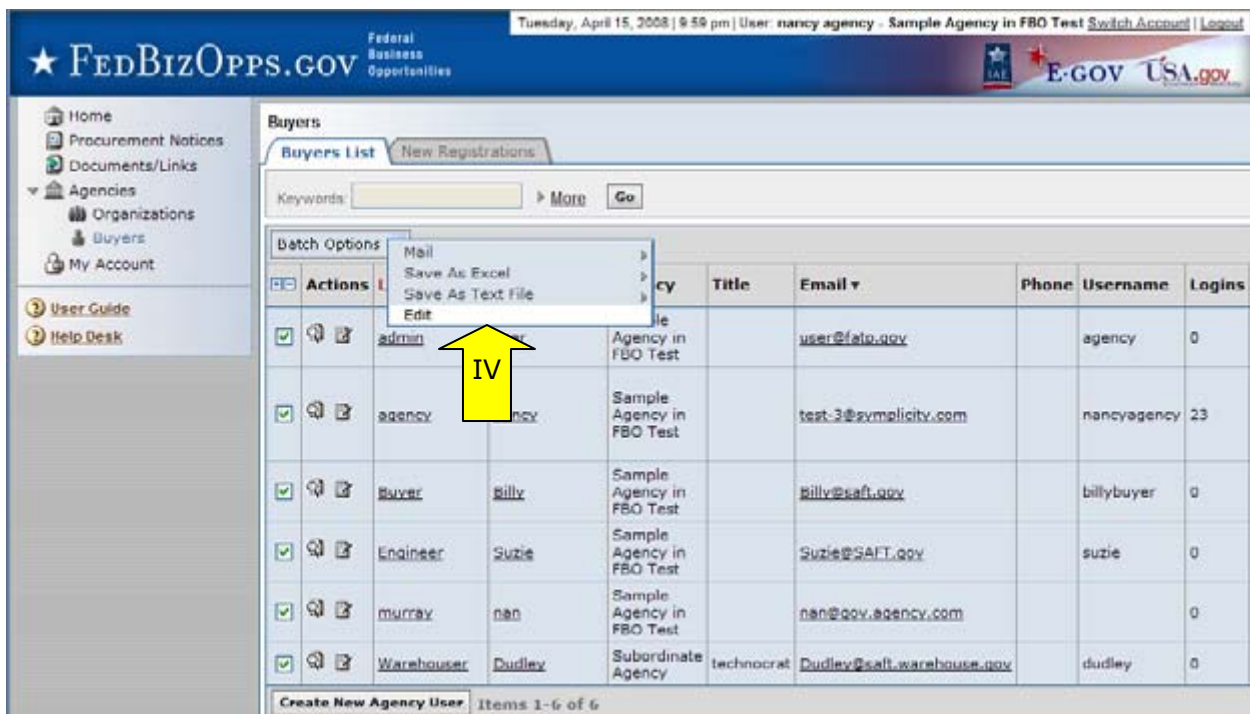
- I. From the Buyers or Electronic Accounts list of accounts, the user can save a list of all, or select members of the list, to text file format.
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the text file list. "-" will unselect all in the list.
- 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 text 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.



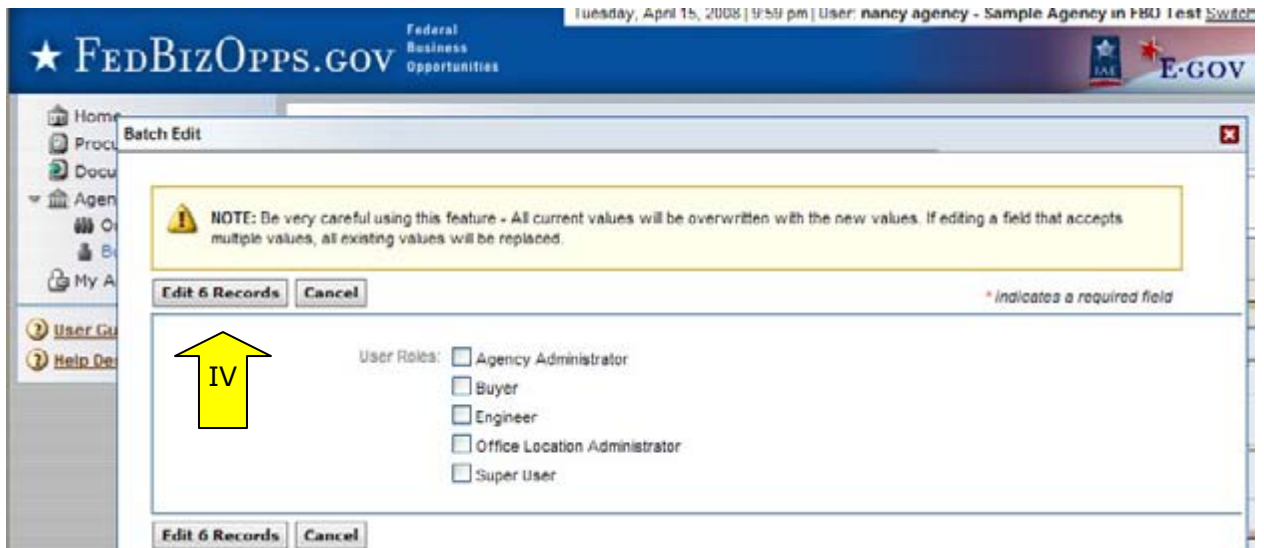
- VI. Follow your browser prompts to open or save the text file.
- VII. System will create text file with select fields for the buyer accounts selected.

9.8 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.



- 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").



9.9 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' section of the FEDBIZOPPS.GOV website. The page title is 'Buyers' and it has tabs for 'Buyers List' and 'New Registrations'. Below the tabs is a search bar with 'Keywords:' and a 'Go' button. A dropdown menu for 'Batch Options' is visible. The main content is a table with columns: Actions, Last Name, First Name, Agency, Title, Email, Phone, Username, and Logins. The table contains six rows of user data. A yellow arrow labeled 'II' points to the edit icon in the 'Actions' column for the user 'agency'.

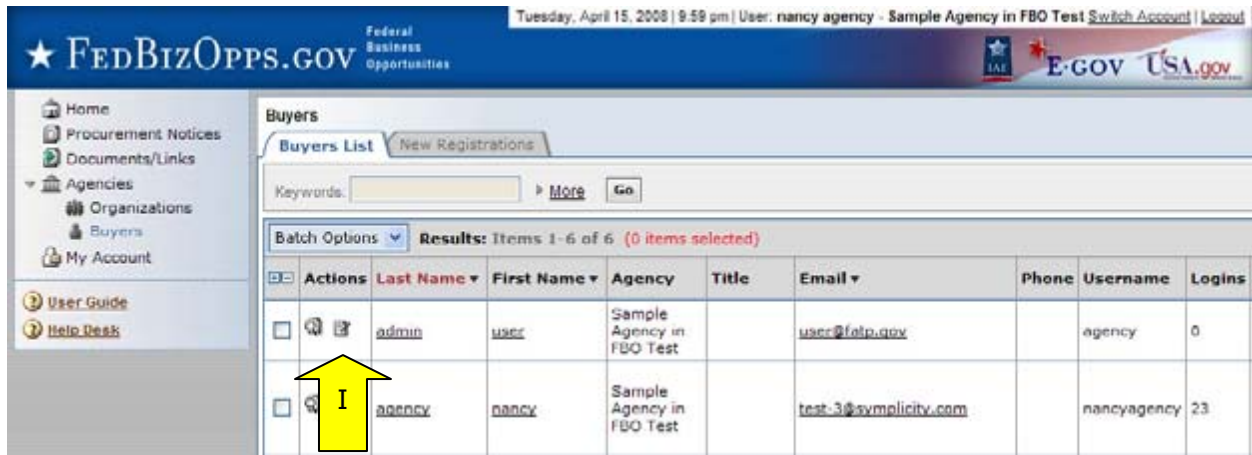
Actions	Last Name	First Name	Agency	Title	Email	Phone	Username	Logins
<input type="checkbox"/>	admin	user	Sample Agency in FBO Test		user@fatp.gov		agency	0
<input type="checkbox"/>	agency	nancy	Sample Agency in FBO Test		test-3@svmplicity.com		nancyagency	23
<input type="checkbox"/>	Buyer	Billy	Sample 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	Dudley@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. The page has tabs for 'Core', 'Accounts', 'Username/Password', and 'Login As'. The 'Username/Password' tab is active. Below the tabs are 'Save' and 'Return' buttons. The main content area is titled 'Account Information' and contains a form with the following fields: 'Disable Account' (radio buttons for 'yes' and 'no'), 'Username' (text field with 'agency' entered), 'Enter New Password' (text field), and 'Verify Password' (text field). A yellow arrow labeled 'IV' points to the 'Save' button. On the right side, there is a 'Buyers Info' box with the following information: Created: April 15, 2008 12:42 pm, By: nancy agency, Modified: April 15, 2008 12:42 pm, By: nancy agency.

9.10 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.



Tuesday, April 15, 2008 | 9:59 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

Federal Business Opportunities



Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

Buyers

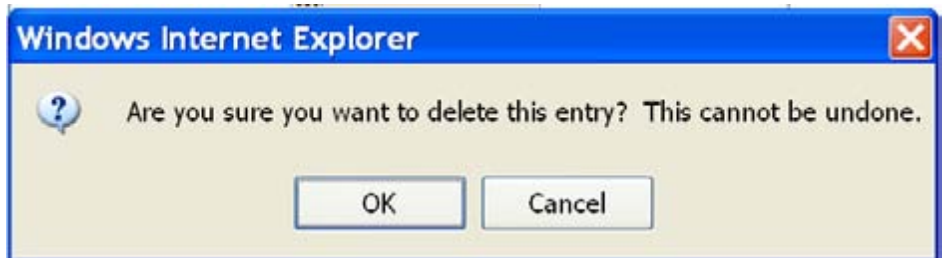
Buyers List | New Registrations

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

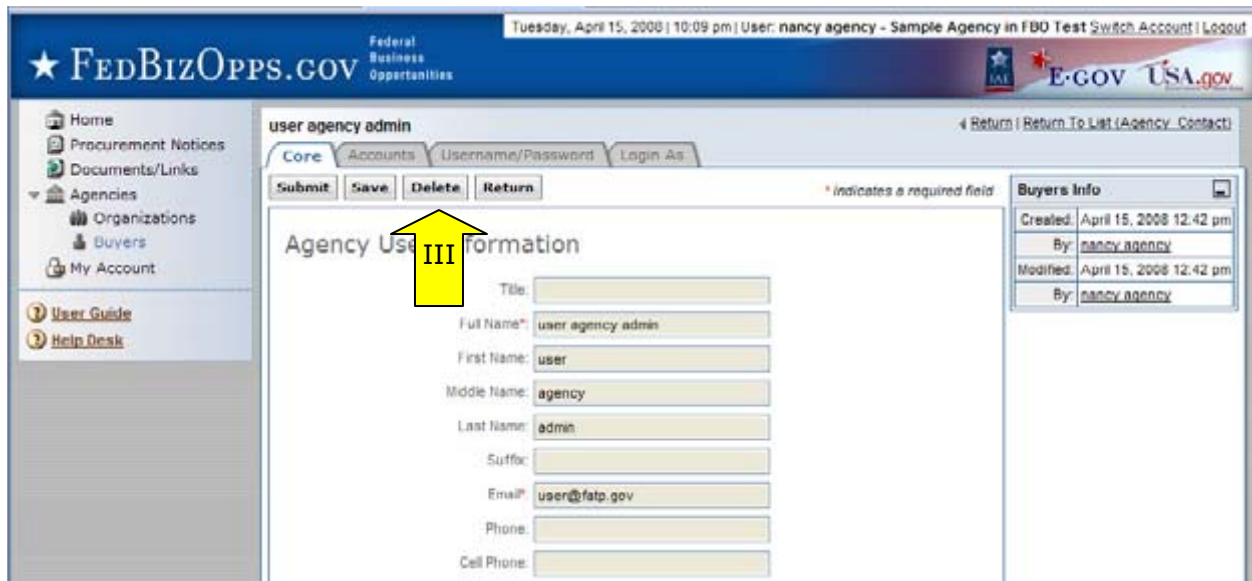
Batch Options **Results:** Items 1-6 of 6 (0 items selected)

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.



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



Tuesday, April 15, 2008 | 10:09 pm | User: nancy agency - Sample Agency in FBO Test | [Switch Account](#) | [Logout](#)

Federal Business Opportunities

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

user agency admin

Core | Accounts | Username/Password | Login As

Submit Save Delete Return

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