FBO.GOV Engineer Guide 1.5

Updated: 4/30/2008

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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:
  - o Maintain Buyer Profile. Buyers can be set up to be agency, or specific contracting office, buyers.
  - o Create, Modify/Amend, or Cancel an Opportunity Notice.
  - o 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)
  - o 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.
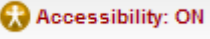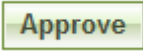
- <u>Vendor Opportunity Review Features:</u> Vendor can search for opportunities based on the following terms:
    - keyword search
    - opportunity/procurement type
    - posting date
    - response deadline
    - last modified date
    - place of performance zip code
    - set-aside code ("set aside" solicitations allow only specified business concerns)
    - classification code
   - NAICS (North American Industry Classification System) code
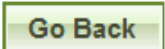   - agency/Office(s)

  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).
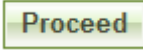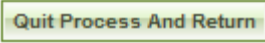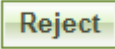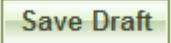
- <u>Opportunity Actions:</u> Vendor is able to add themselves to the "interested vendors list" for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors 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	Accessibility or Accessibility: ON	Accessibility Mode – Disables select interface enhancements to ensure users of assistive technologies have full and equal access to all aspects of this web site. Icon is "red" if accessibility mode is "on" or "blue" if accessibility mode is "off".
Account	n/a	From an "account," a user is designated as a engineer for a particular agency or office. Because some engineers are associated with multiple agency's/offices, they will have multiple accounts tied to their username.
Approve	Approve	The "Approve" button is used to approve a vendor's request for explicit access to sensitive, but unclassified documents.
Audit Trail	n/a	For sensitive, but unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the "audit trail" sub-tab of a released document.
Authorized Party	n/a	Certain sensitive, but unclassified package(s) require that a vendor be explicitly authorized to review the materials. A government user can pro-actively select a vendor user for access, or a vendor can request, and be granted access, through this system. Once the vendor is given explicit access to review the package, they are an "authorized" party.
Authorized Vendor	n/a	Export Controlled requires that the vendor's company be certified by the Defense Logistics Information Service Joint Certification Program to receive unclassified technical data disclosing military critical technology with military or space application. Those vendors that are certified to receive export controlled materials are termed "authorized vendors." This system receives a daily feed of authorized vendors, which determines access based on a vendor's Cage code/MPIN.
Buyer	n/a	Government user that is presenting an opportunity notice in the system.
Cage Code	n/a	Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies companies doing, or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second, third and fourth may be any mixture of alpha/numeric excluding I and O. All positions are non-significant. The code provides for a standardized method of identifying a given facility at a specific location.

Clear	Clear	The "Clear" button appears when a users is using search filters. If selected, the system "clears" any previously entered search filters.
Document	n/a	"Document" is a single attachment (either link or uploaded document) that can be attached to a "Notice". A collection of documents can be bundled to create a "Package"
Draft	✖	Saved, but not necessarily complete. Drafts are not viewable on vendor interface.
DUNS	n/a	DUNS (Data Universal Number System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central Contract Registration) prior to the award of a contract; basic agreement, basic ordering agreement, or blanket purchase agreement. According to FAR 52.204-7, to register in CCR, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
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	Go	If data is entered in keyword search filter, select the "Go" button to submit the request.
Go Back	Go Back	During a stepwise process, use of the "go back" button takes the user back one step in the process.
Help	❓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.
Log-in	Login	Use username and password to logon to an account on the system

Logout	Logout	The "Logout" button can be used to log the user off the system.
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 Link	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".
Proceed	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).
Quit Process and Return	Quit Process And Return	The "quit process and return" button returns the user to the previous page, without updating any record fields.
Register	▸ Register Now	Request a user account on the system.
Reject	Reject	The "Reject" button is used to reject a vendor's request for explicit access to sensitive, but unclassified documents.
Release Package	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	Return	The "return" button returns the user to the navigation.
Review or view		"Review" opens an object for review.
Save	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	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).
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.
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.

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

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

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

I. Step two – Account Information is entered - Agency / Office is set up, along with password creation. When you enter a desired password, for security purposes, the password must meet the following criteria:
- Must be between 8 and 14 characters
- Must contain 1 of each of the following:
  o lower case letter
  o upper case letter
  o number
  o special character (e.g. !, %,^)

II. During account registration register to be an "engineer," or both "buyer" and "engineer." Registering as both allows a single user to both create sensitive, but unclassified documents and to manage opportunities. (See "buyer" manual to learn about buyer functionality).

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.

[Go Back] [Cancel] [Proceed & Review] III
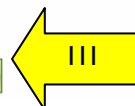
I.   Step three – Review/Submit - Registrant is asked to review registration information.
II. Click "go back" to correct information on previous steps.
III. If everything is correct, click "submit" at the bottom of the page.
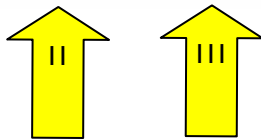
I. The next screen explains that registrants will receive an e-mail after submitting a registration which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail

II. Once the engineer 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 engineers 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 enter username and password.

   II.   Click "Login" to continue.

  III.   The "Password Reminder" option allows a user to request a password via email.

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.
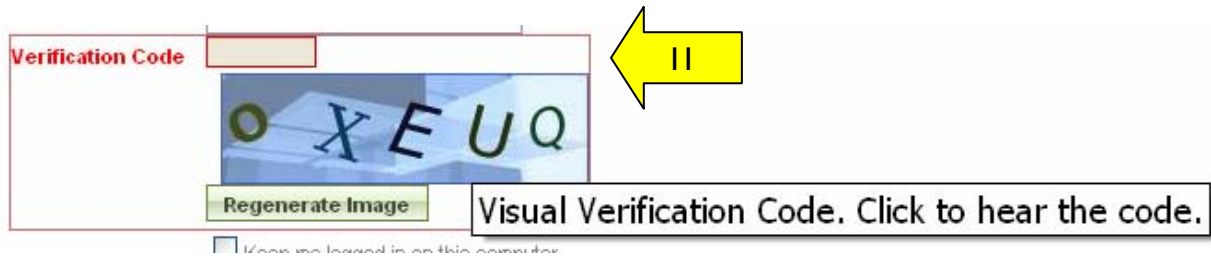
2.4.2 FBO Terms and Conditions

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.

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

II

Accept   Decline

3 Engineer'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 Top of Page Navigation

Navigation for the Engineer's Secured Interface appears across the top of the user's page. Using this navigation, users can move between the following key navigational elements: "My FBO", "My Profile", and "Document Packages".

NOTE: a green, versus blue, background highlights what the user has selected on the upper navigation bar.

3.2.1 My FBO

"My FBO" is a user's home page (resource page). The page allows for easy access to the following system features:

    I. "Announcements" – System Announcements posted for the user's reference.

    II. "Pending Actions" – Tally of the pending actions, (e.g, number of explicit access requests in need of processing).

3.2.2 Multi-account Users

I.   All users will have one "username". A "username" can be associated with several "accounts. From an "account," a user is designated as a engineer for a particular agency or office. Because some engineers are associated with multiple agency's/offices, they will have multiple accounts tied to their username. User's having multiple associations can switch between accounts by using the "switch account" tool at the top of the page. The switch account option will appear on the top of all pages of navigation. If the username is not associated with multiple accounts, this link will not be available.

II. When a user log's in, they will see "welcome, "user name" / "agency" of the account they are currently managing.

III. If "switch account" link is clicked, the user will have a chance to change to another account.

I. 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.

Windows Internet Explorer

? Are you sure you want to switch to a different account? You will be redirected to My FBO Home Page. Please save any work in progress!

OK   Cancel
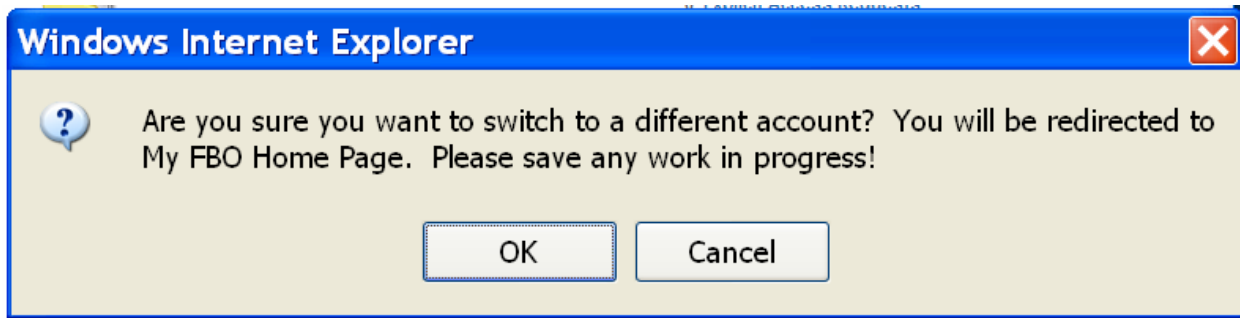
3.2.3 My Profile

I. There are two sub-tabs on the users "My Profile" 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 engineer is able to manage on their account's secured interface. Engineers will manage opportunities that are aligned with their agency/location branch of the organization.

III. From the "contact information" tab, select the "edit" to changes contact fields.

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

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

3.2.4 Document Packages

I. There are two sub-tabs on the user's "Document Packages" page. The "technical documents" sub-tab presents the list of active document packages associated with their agency/office notice.

II. The "authorized parties" tab has three sub tabs which enumerate, "authorized" vendors, "pending request" for authorization, and "rejected requests" for authorization.

III. The keyword search allows a user to conduct a full word search of the document title.

IV. "more" opens up additional search filters ("less" closes the added search filters).
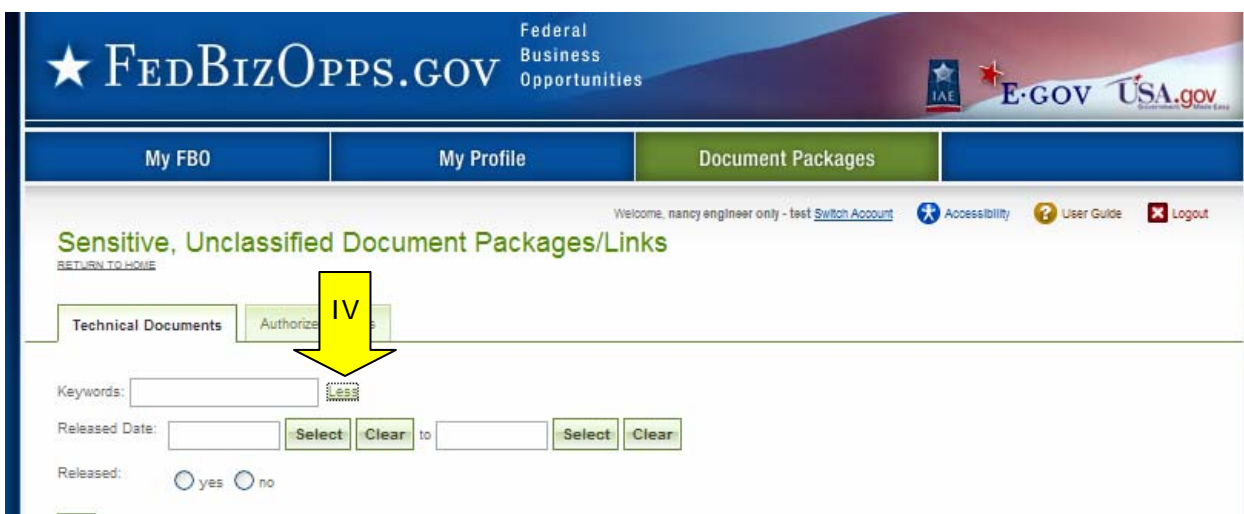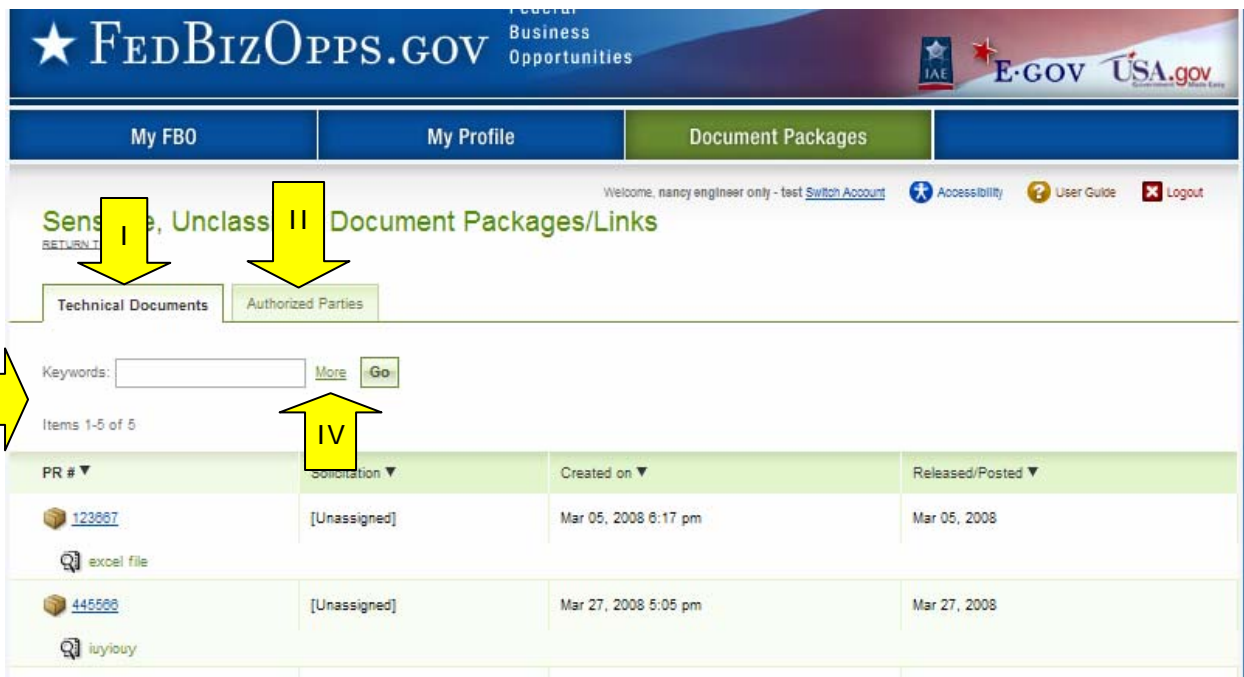
4 Document Packages

NOTE: If export control, or explicit access, are required on any of a 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.

4.1 Create New Document

I. To add a new document package, go to main navigation "document packages", and select "add new package".

I. The user is then prompted to complete a series of steps, to add the new package.
II. The first step establishes the details of the package.
III. The required fields must be completed before the user can use the "save as draft" resource. If "save as draft" is used, the document package will appear on the user's document package list.
IV. "Quit Process and Return" returns the user to the previous navigation.
V. "Proceed" takes the user to the next step in the process.

I. At step two, the user uploads the files. The user is able to use the "browse" tool to find the files for upload.
II. The user can upload zipped files. Indicate a zip file by checking the box.
III. File description is required.
IV. A user can use "remove" to remove a file.
V. "Add Another File To This Package" allows the user to add another file to the package.
VI. If "save as draft" is used, the user saves their work. The draft document can then be found on their document package list with a x indicating the package is not released.
VII. "Go Back" takes the user back to step one.
VIII. "Quit Process and Return" does not save work, and returns the user to the previous navigation.
IX. "Proceed & Review" takes the user to the final step in the package creation process.
X. **Note -** There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

I. At step three, the user has a chance to review the submitted materials.
II. "Go Back" takes the user back to step one.
III. If "save as draft" is used, the user saves their work. The draft document can then be found on their document package list with a x indicating the package is not released.
IV. "Quit Process and Return" does not save work, and returns the user to the previous navigation.
V. "Release Package," releases the package for use by buyers.

4.2 Delete Document Package

  I. Note, if a package has been posted to a solicitation, the engineer will not be able to delete the package.

 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.

I. Once the package is open, select "delete" to delete the package.
II. Users will be asked to confirm their request, because the action is immediate and non-reversible.   Select "ok" to confirm.

4.3 Edit Document Package

I.   Note, if a package has been posted to a solicitation, the engineer will not be able to edit the package.

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.

I.   Once the package is open, select "edit" to make changes to the package.
II. Users will be asked to confirm their request, because the.   Select "ok" to confirm.
III. 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.

Windows Internet Explorer

Are you sure you want to edit this package? It has already been released but you may make modifications because it is not yet attached to a solicitation

[OK]   [Cancel]

★ FEDBIZOPPS.GOV   Federal Business Opportunities

IAE   E·GOV   USA.gov

| My FBO | My Profile | Document Packages | |

Welcome, nancy engineer only - test Switch Account   Accessibility   User Guide   Logout

test
RETURN | RETURN TO LIST (DOCUMENT_PACKAGE)

Details   Audit Trail

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

[Return] [Delete] [Edit]

Contracting Office Location:	test
Is this a secure/sensitive package?:	yes
Label:	test
PR #:	test328
Project #:	34333
NSN / MMAC:	asdfds
Part Number #:	88899
Nomenclature:	widget
Is this Export Controlled?:	no
Explicit Access:	yes
Is CD Available:	no

uh pic.bmp (1,727.54 Kb)
Description: test

[Return] [Delete] [Edit]

I

5 Manage Explicit Access Requests

I.   An engineer can see if they have any pending "Explicit Access Requests" on their "My FBO" 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.

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.

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. If the user chooses to "reject" the request, they select "reject" (see below for details on rejection).
IV. If the user is not ready to do either action, use "return to list" to retain pending status on the record.
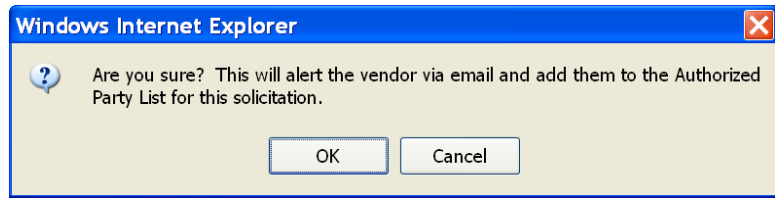
I.   If "reject" was selected, the user will be prompted to provide text explaining the rejection. This information will be included in the rejection email received by the vendor.
II. If a user changes their mind at this step, they can still use "return" button to retain the pending status of the explicit access request.
III. "Save and Send Rejection" will change the request status to rejected and send vendor notification about rejection.

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. Audit trail does not record data if for secured "links." An audit trail is only maintained if uploaded material was in the format of upload file(s).

II. Go to main navigation "Document Packages." For the document package you would like to review, click on the package link.

I. When the Document package record is opened, it defaults to the "details" sub-tab for the record. Click on the "audit trail" sub-tab, to review the listing of vendor review.

I. 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.)

II. Click the review icon to open the audit trail record.

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

II. "Return" closes the audit trail record.