FBO.GOV Buyer User Guide 1.9

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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:

- Getting Started Training Materials
- General Information
- Opportunities
- Agencies / Offices List
- 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 documents (and attach existing controlled, unclassified documents to notices)
    - Receive and electronically evaluate vendor proposals, quotes, and information (if the Agency/Office Location Administrator enables the Bid Module functionality for the Buyer's registered location).
    - 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 controlled, 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 controlled, 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 able to post opportunities for their agency and also have the ability to enable or disable the Bid Module functionality for their users
- **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 Numbering System) Number
    - Commercial and Government Entity (CAGE) Code
    - MPIN (Marketing Partner Identification Number) – Optional profile field required to view controlled, unclassified materials.

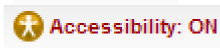
- Vendor Opportunity Review Features: Vendors can search for opportunities based on the following terms:
    - Keyword or Solicitation Number
    - Opportunity/Procurement Type
    - Posted Date
    - Response Deadline
    - Last Modified Date
    - Contract Award Date
    - Place of Performance Zip Code
    - Place of Performance State
    - Set-Aside Code ("set-aside" solicitations allow only specified business concerns)
    - Classification Code
    - NAICS (North American Industry Classification System) Code
    - Agency/Office/Location(s)
    - Recovery and Reinvestment Act Action
    - J&A Statutory Authority

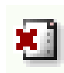
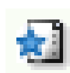
  Vendor can set up "search agents" based on detailed search elements which highlight newly added opportunities aligning with their search criteria. Vendors can add opportunities to a "watched list" list (akin to a "favorites" list"). Per the vendor's profile status, a vendor can review documents associated with the opportunity (Packages).

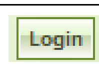
- Opportunity Actions: Vendors are able to add themselves to the "Interested Vendors List" (IVL) for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors can request explicit access to view controlled, unclassified packages with explicit access designation. If the vendor's profile indicates that the vendor is eligible for access to export controlled packages, the system allows the vendor access. Additionally, Vendors can electronically respond to RFIs, RFQs, and RFPs directly through the web site for those notices which have the Bid Module enabled by the buyer.

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 an 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.
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 controlled, unclassified documents.
Audit Trail	n/a	For controlled, 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 controlled, 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 access level requires that the vendor's company be certified by the Defense Logistics Information Service's 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 buyer, the Bid Module 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 user 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”
Doc Package	n/a	If enabled by the buyer, vendors can submit an electronic response to notices in the form of document (file) uploads.
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 Numbering System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central Contractor 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 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 controlled, 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 controlled, 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 access level requires that the vendor's company be certified by the Defense Logistics Information Service's Joint Certification Program (JCP) 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.
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., 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 access level requires that the vendor's company be certified by the Defense Logistics Information Service's Joint Certification Program (JCP) 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 controlled, 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 controlled,

		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 Plain Text		When entering "description" field for Solicitation, users can use this paste plain text tool to open pop-up that allows for plain text insertion into the field.
Post	Post	Finalizes a Notice and posts the notice on the system for vendor review.
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).
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	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 controlled, 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).
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.
Controlled, Unclassified Document	n/a	Vendors are required to logon to the system and to have a valid MPIN on file, to review controlled, unclassified documents. "Export Controlled" and

		"explicit access" are more stringent access controls that may also apply to controlled, 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).
Switch Accounts		Because some buyers 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
Username	n/a	All users will have one "username". The username is used to log into the system.
Vendor	n/a	Provider of services.
Watched List		Designation that vendor can set on a notice that saves the notice on a sub-tab list of notices. The watched list is easily accessed with a quick .

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:

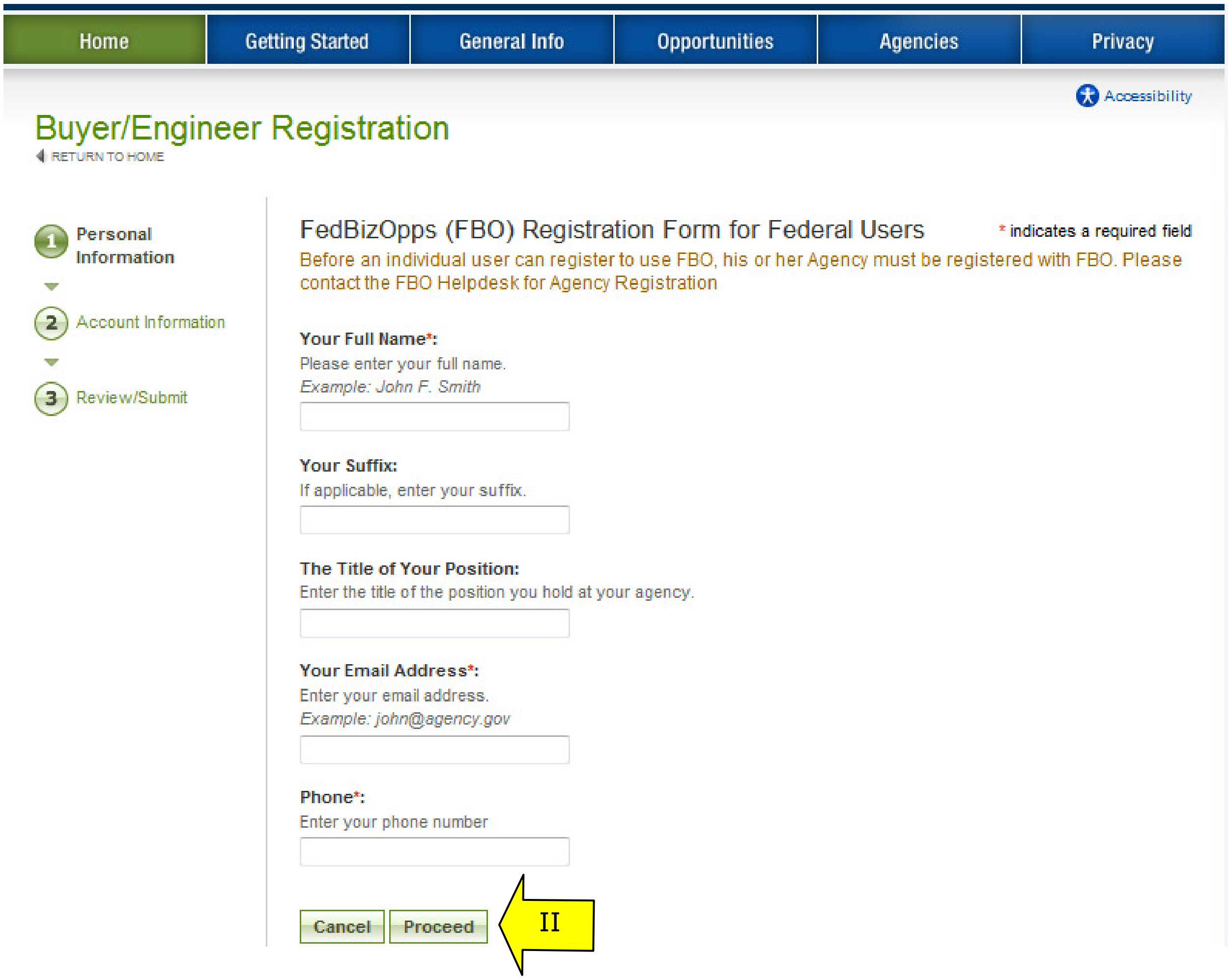
I. Getting Started
II. General Information
III. Opportunities (for all agency office locations)
IV. Agencies
V. Privacy

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 Federal Service Desk (www.fsd.gov) for assistance with Agency Registration.

I. To get started, go to www.fbo.gov and click on the "Register Now" link located in the Buyers / Engineers section. This will open up a series of screens where the user enters registration data.

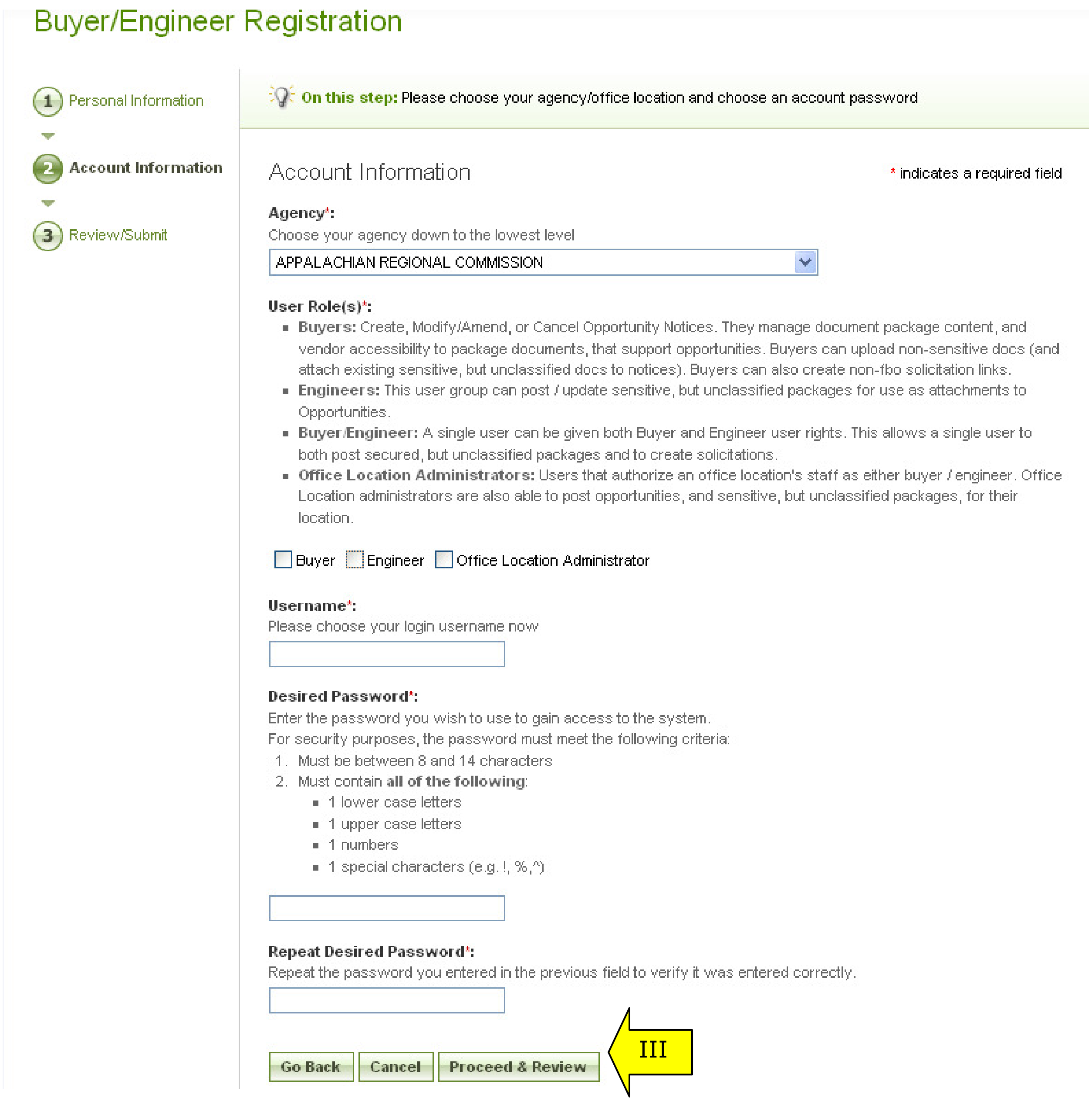
II. Step one – Personal Information is entered. Once required fields are completed, select "Proceed".



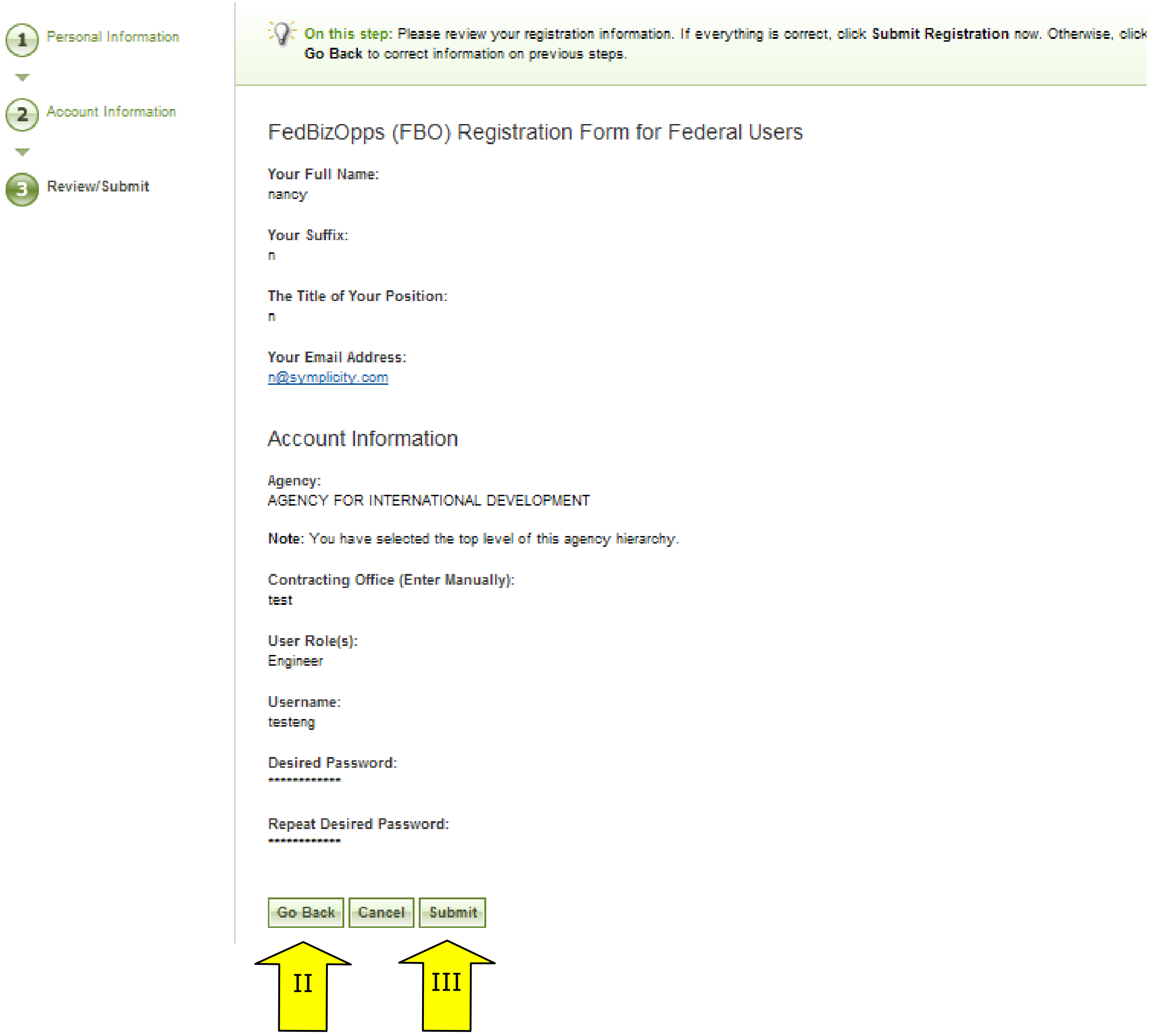
I. Step two – Account Information is entered - Agency / Office is set up, along with password creation. When you enter a desired password, for security purposes, the password must meet the following criteria:
   - Must be between 8 and 14 characters
   - Must contain 1 of each of the following:
    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

II. During account registration, buyers can register to be a "buyer", "engineer" or both "buyer" and "engineer." Registering as both allows a single user to both create controlled, unclassified documents and to manage opportunities.

III. Once required fields are entered, select "proceed and review".



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 buyer has completed the steps outlined in the email, the registrant's account must now wait for administrator approval prior to being able to logon to the system.

III. Once approved, newly registered buyers will be sent a confirmation e-mail. Once that approval is received, a new user may login to the system.

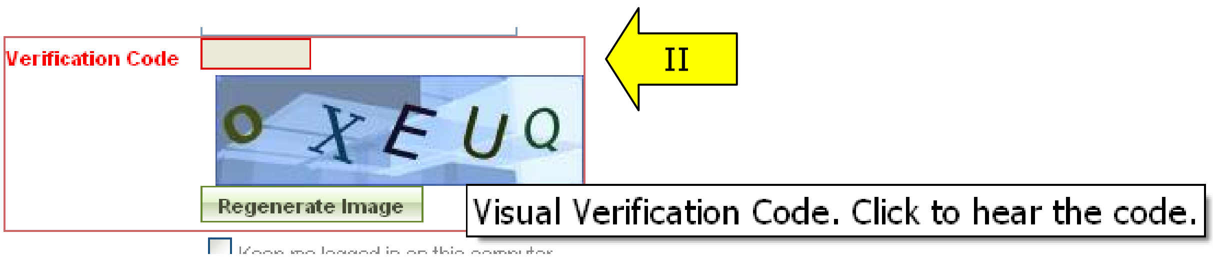
2.4 Returning Users – Log into the system

I. Point your browser to https://www.fbo.gov and enter username and password.
II. Click "Login" button.

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.

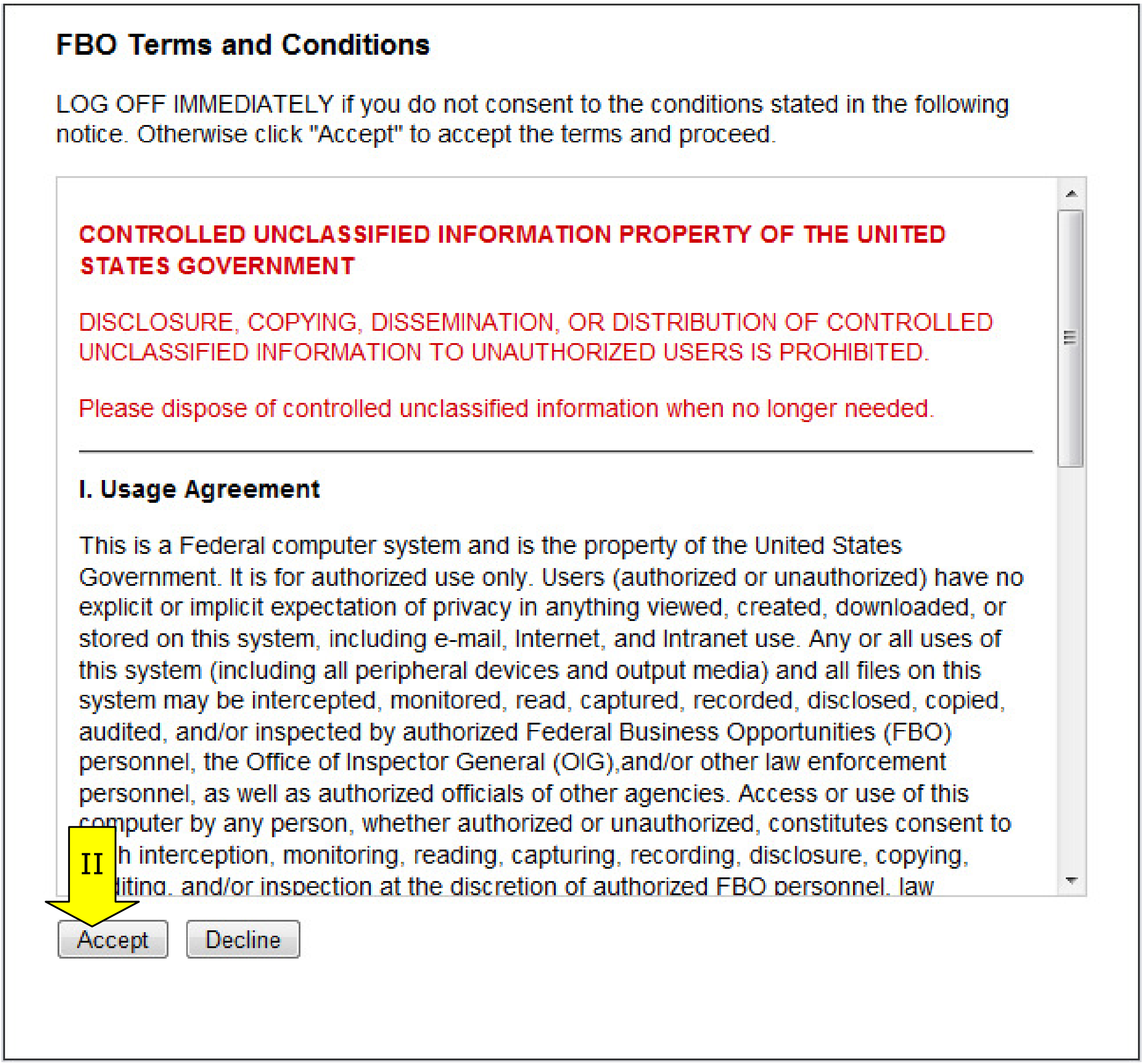
II. The user must enter the characters displayed in the "Verification Code" with their username and password in order to attempt another login. This prevents unauthorized access by spammers and other security threats. Users can click on the image to hear the code.



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.



3 Buyer’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

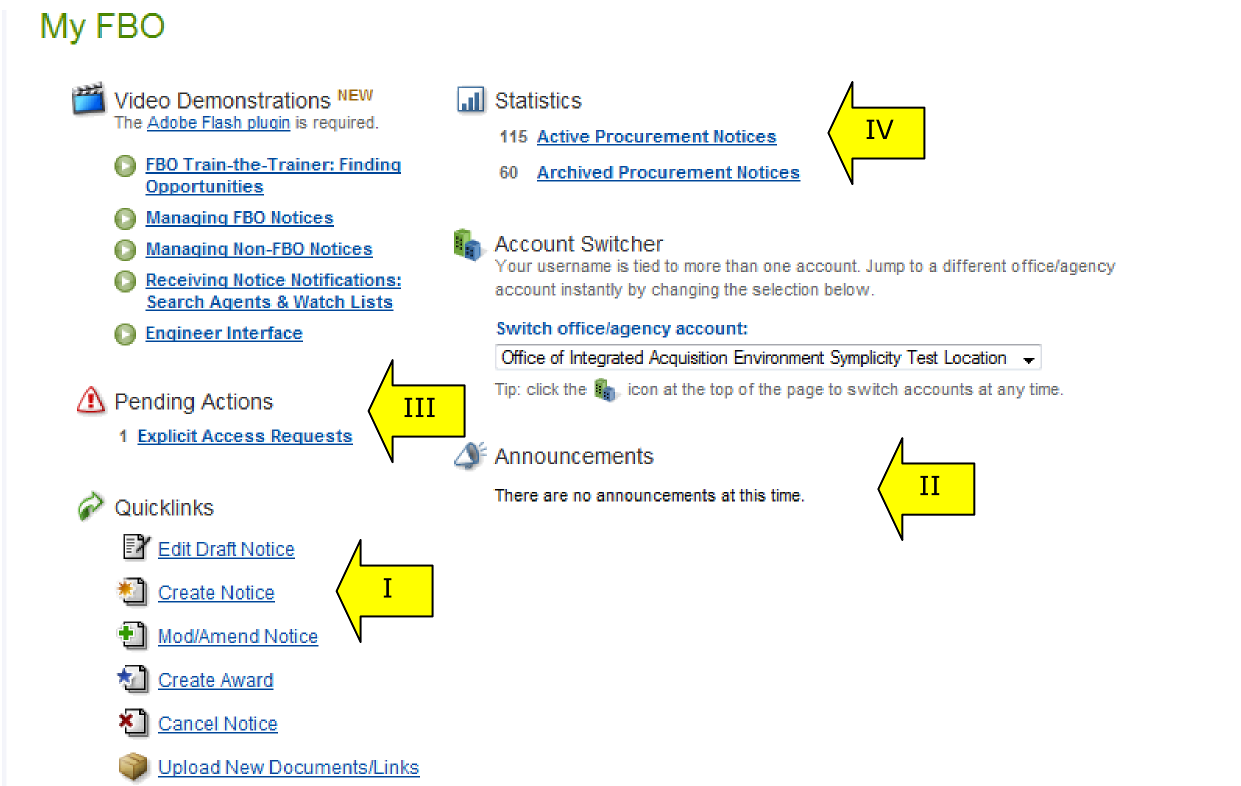
I. Navigation for the Buyer’s Secured Interface appears across the top of the user’s page. Using this navigation, users can move between the following key navigational elements: “My FBO”, “My Profile”, “Notices”, and “Document Packages”.

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

3.2.1 My FBO

The "My FBO" 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.
V. "Video Demonstrations" – Links to training tools regarding FBO functionality.



3.2.2 Multi-account Users

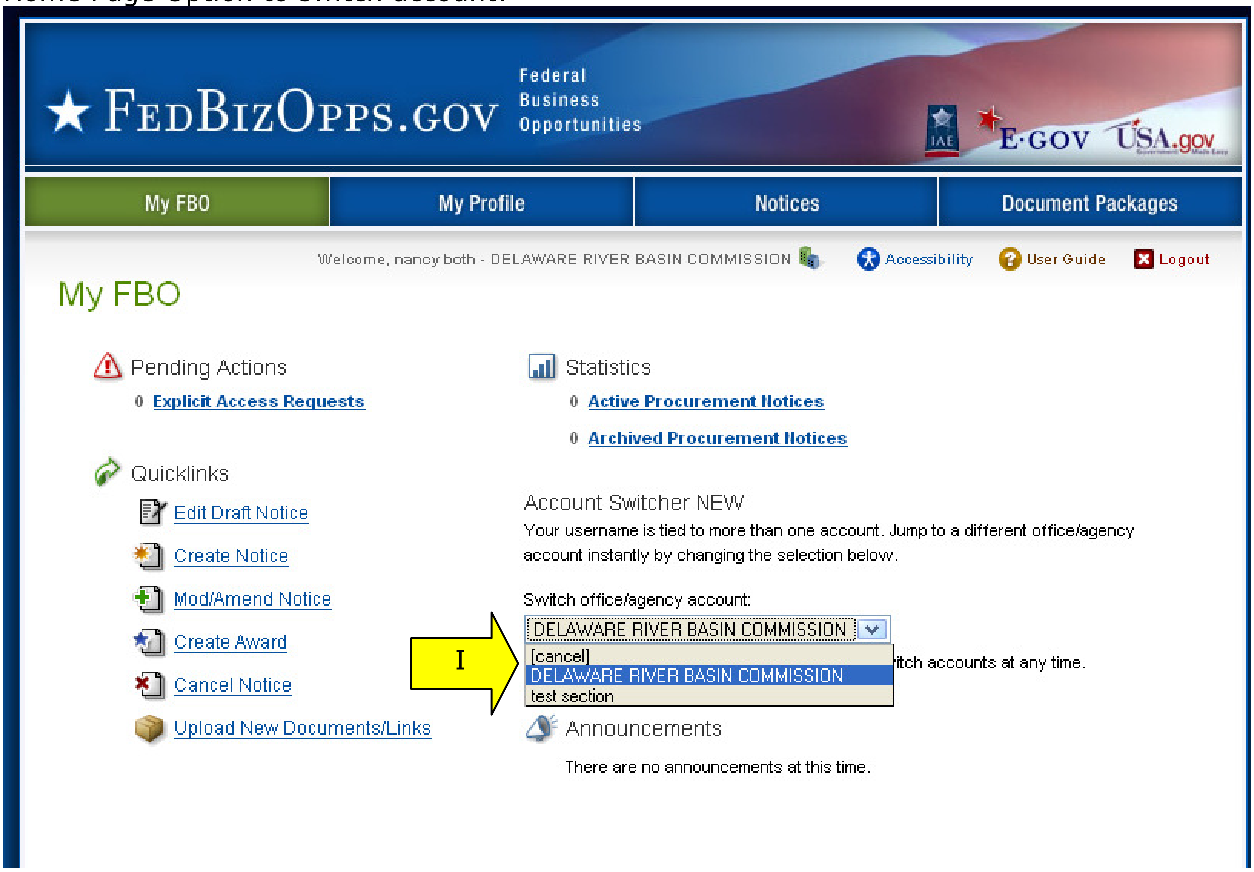
I. Because some buyers are associated with multiple agencies/offices, they will have multiple accounts tied to their username. Users having multiple associations can switch between accounts by using the "switch account" tool on their home page. A smaller switch account option also appears on the top of all pages of navigation.

II. If the username is not associated with multiple accounts, these links will not be available.

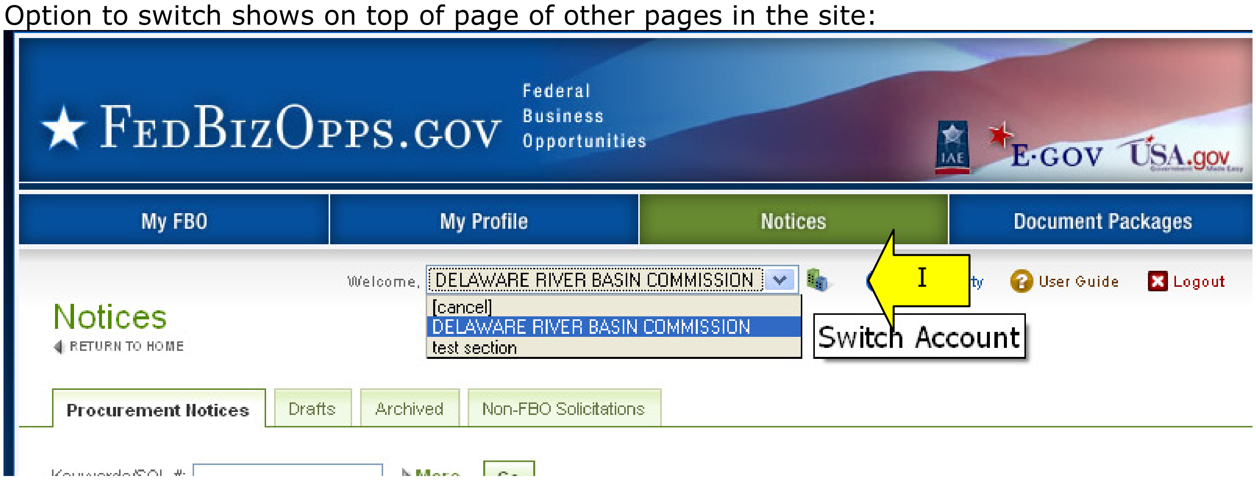
III. When a user logs in, they will see "user name" / "agency" of the account they are currently managing at the top of the page.

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

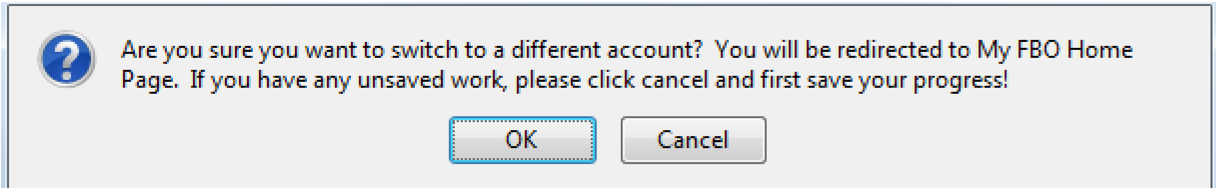
Home Page Option to switch account:



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



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.

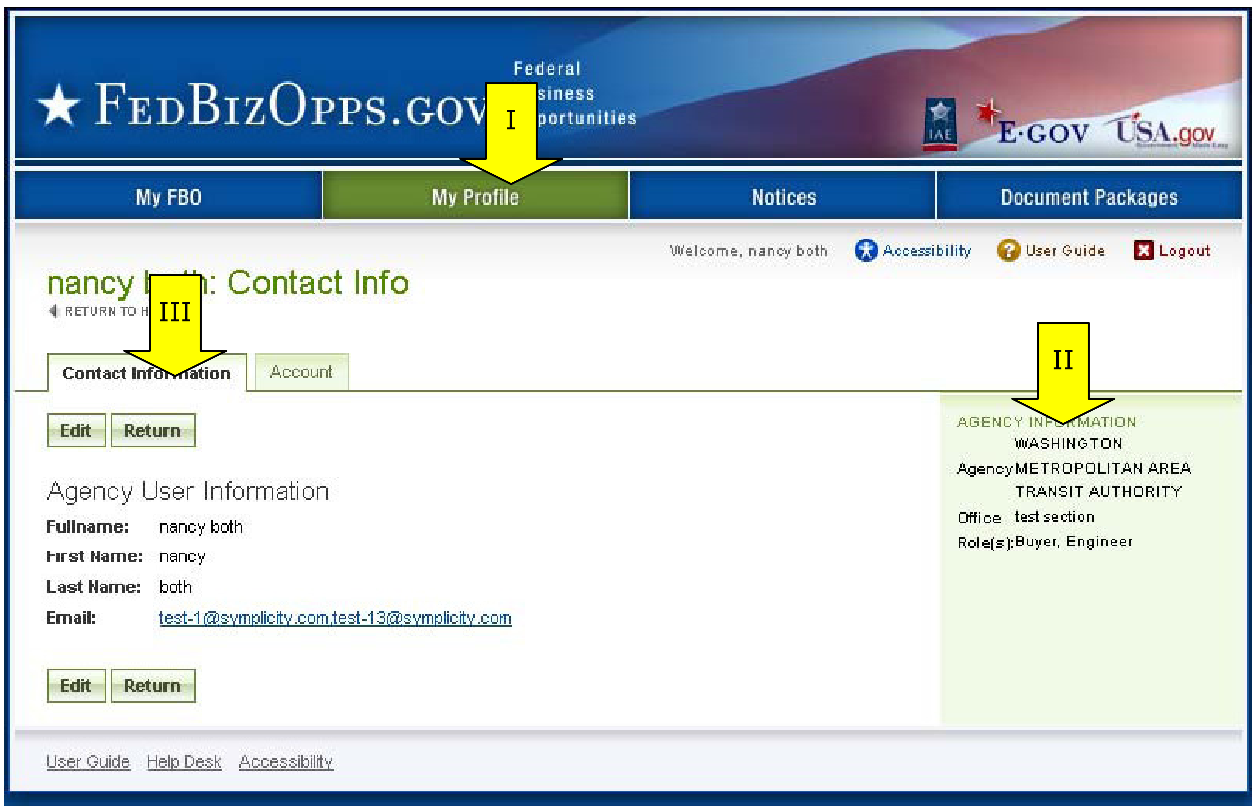


3.2.3 My Profile

I. There are two sub-tabs on the user's "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 buyer is able to manage on their account's secured interface. Buyers will manage opportunities that are aligned with their agency/office location branch of the organization.

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

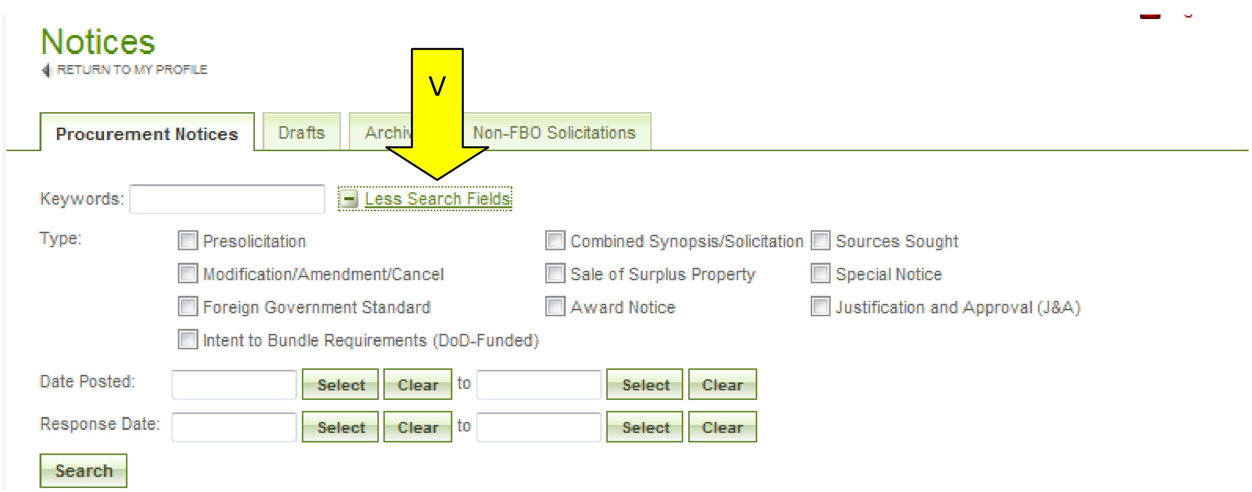


I. Enter field changes as desired. Select "save" to save updates to the form.

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

3.2.4 Procurement Notices

I. There are four sub-tabs on the “Notices” page. “Procurement Notices” lists all “Posted” (viewable on vendor interface) notices.
II. The "Draft" sub-tab presents a list of “draft” (not viewable on vendor interface) notices.
III. The “Archived” sub-tab presents a list of archived notices no longer viewable on the vendor interface.
IV. The “Non-FBO Solicitations” sub-tab 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.
V. “More” opens up additional search filters (“less” closes the added search filters).



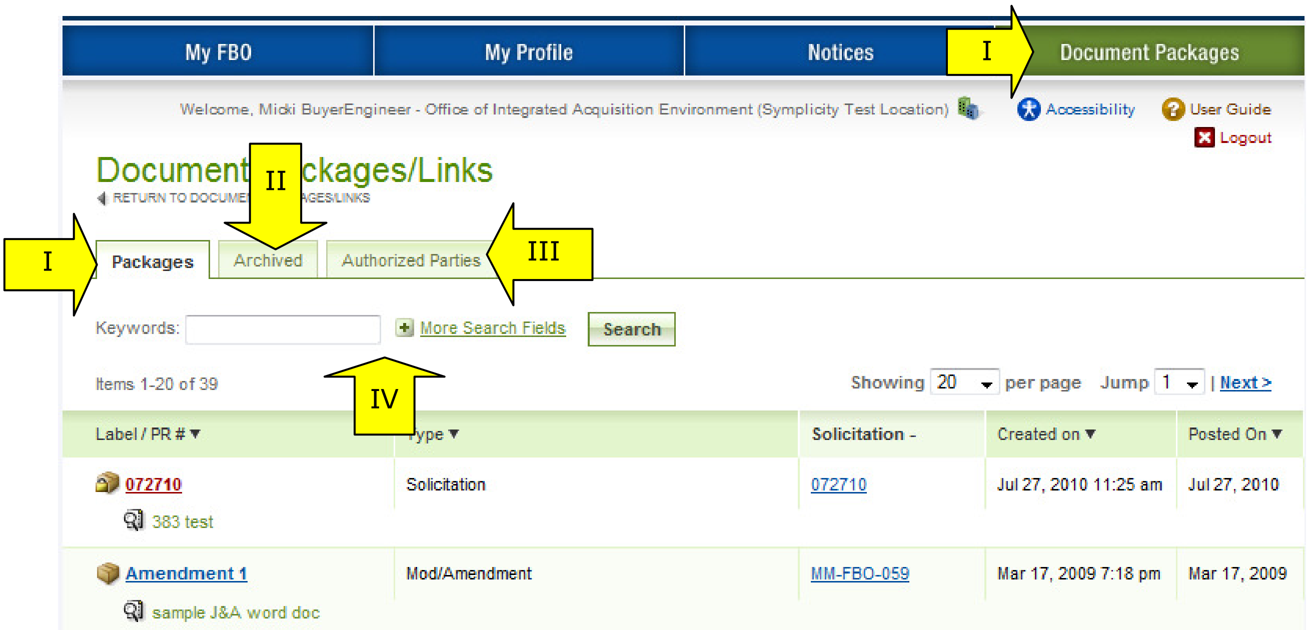
3.2.5 Document Packages

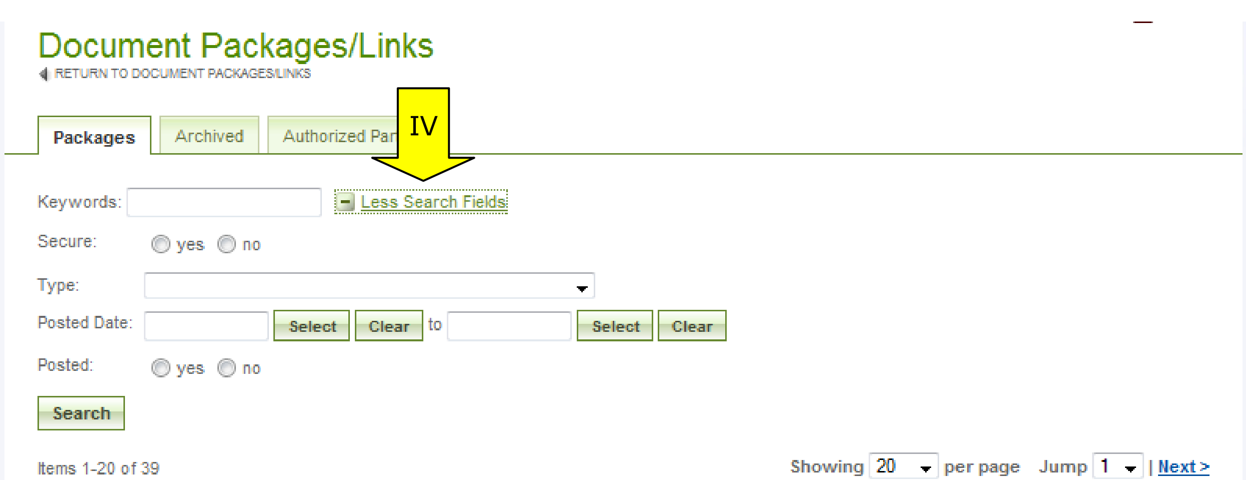
I. There are three sub-tabs on the user's "Document Packages" page. The "packages" sub-tab presents the list of active document packages associated with their registered agency/office.

II. The "archived" tab presents list of archived document packages associated with their registered agency/office.

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

IV. The keyword search allows a user to conduct a full word search of the document title. "More Search Fields" opens up additional search filters ('less" closes the added search filters).



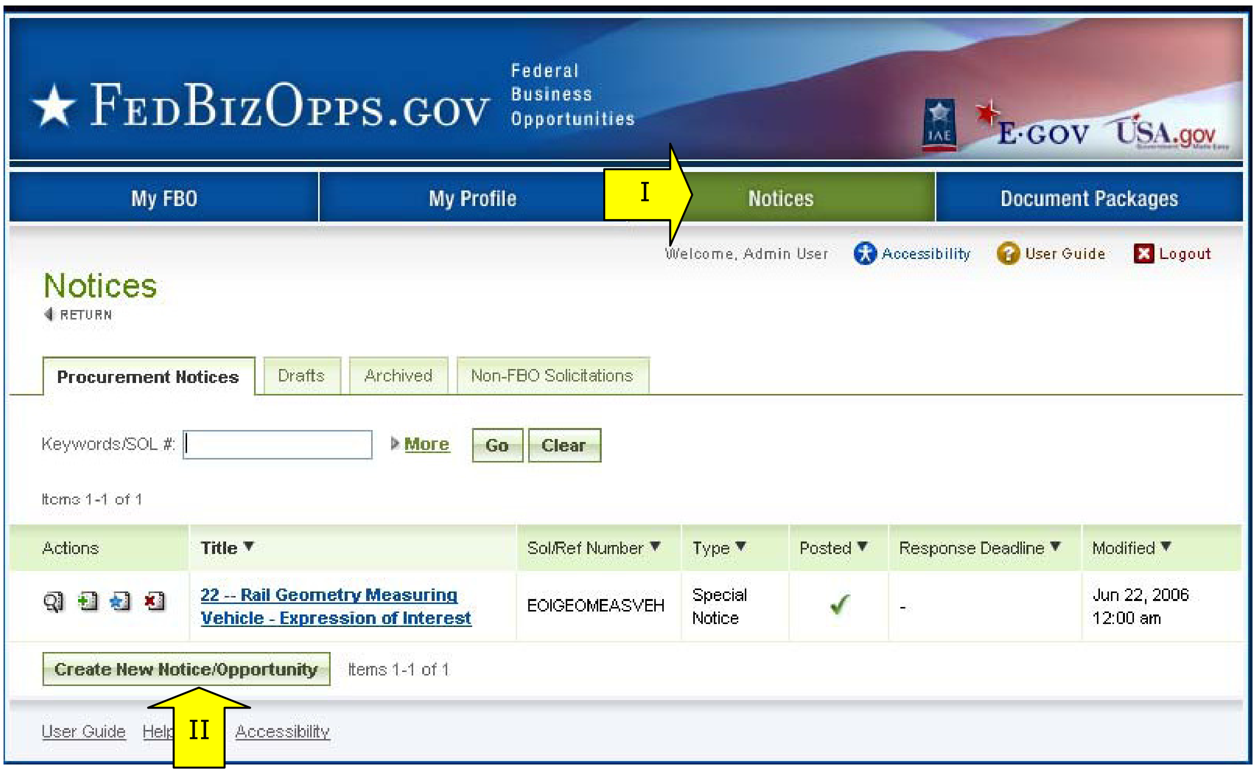


3.3 Manage FBO Notices

3.3.1 Create Notice

I. From any page on the system, a user can go to upper navigation "Notices" button. This takes the user to the "notices" list.

II. From the list, use the "Create New Notice/Opportunity" button, located at the bottom of the page, to initiate a new notice. To create a notice, the buyer will walk through a stepwise process.

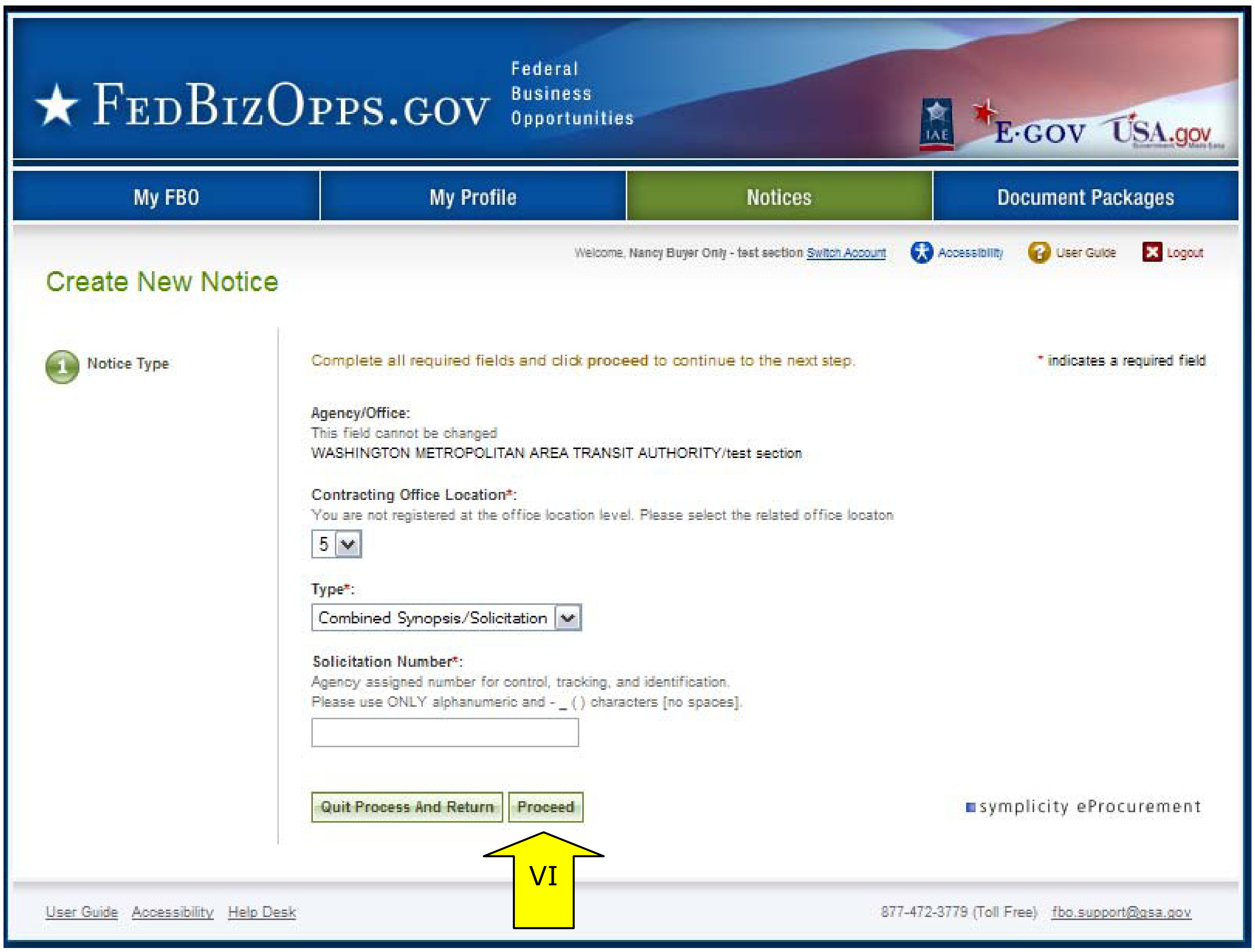


III. Alternatively, a user can use the quicklink "Create Notice" on their home page to initiate a new notice.

Step 1 – NOTICE TYPE

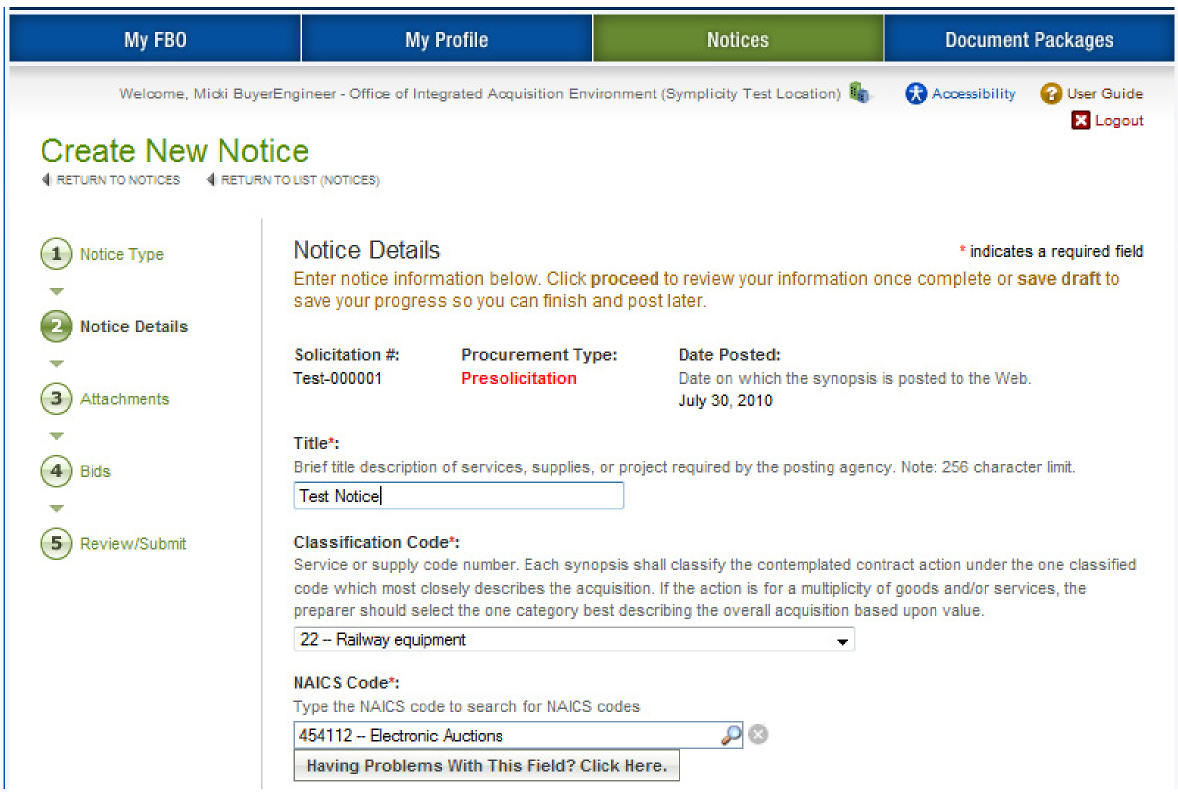
The first step establishes the following fields for the Notice:

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.



Step 2 – NOTICE Details

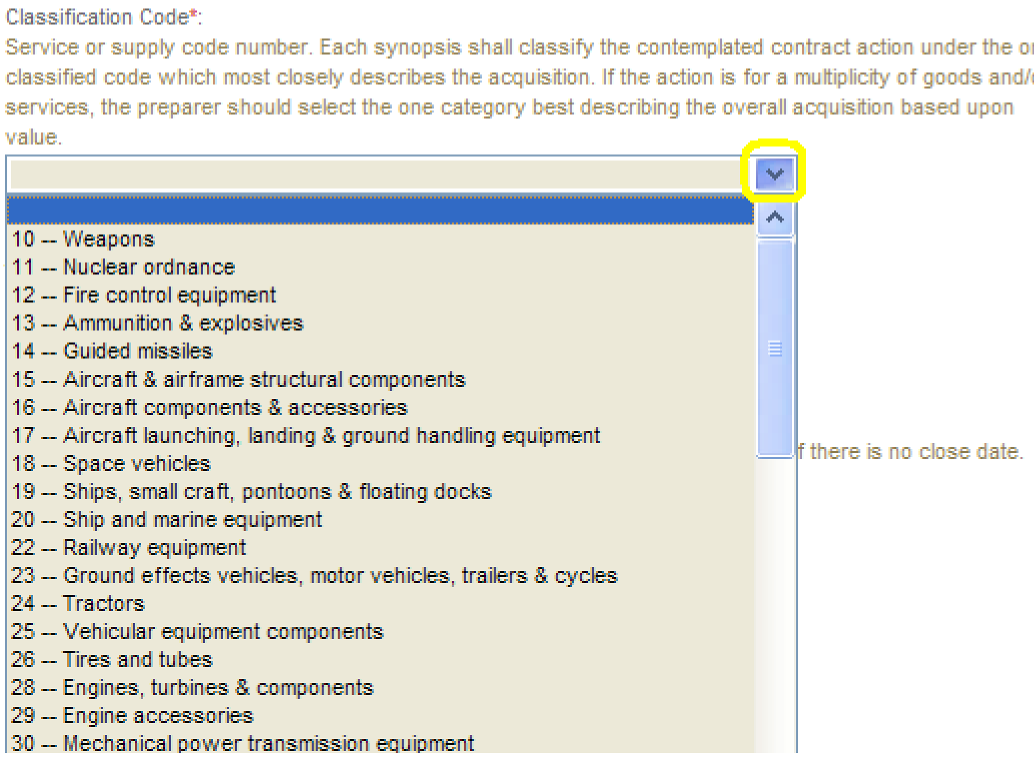
I. The second step establishes the following fields for the Notice (asterisks indicates required form field):
   a. Title* - description of services, supplies, or project required. NOTE: 256 character limit.
   b. Classification Code* - Service or supply code number.
   c. NAICS Code*
   d. Is this a Recovery and Reinvestment Act Action*
   e. Response Date* (note – if time is not selected, it will default to 11:59:59 PM ET)
   f. Primary Point of Contact*
   g. Secondary Point of Contact
   h. Description*
   i. Place of Contact Performance
   j. Set Aside
   k. Archiving Policy* (note - notices archive the morning of this date).
   l. Allow Vendors to Add/Remove From Interested Vendors*
   m. Allow Vendors to View Interested Vendors List*



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).
In addition, 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.

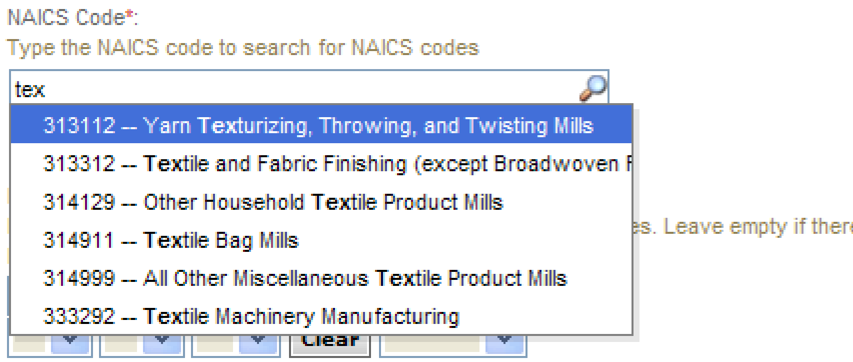
I. For both Classification Code and NAICS Code fields, the system offers some features to help users more quickly navigate to their target values in the code lists.

II. For the Classification Code field, use the arrow key field to open a complete listing. Highlight the target code and hit enter.



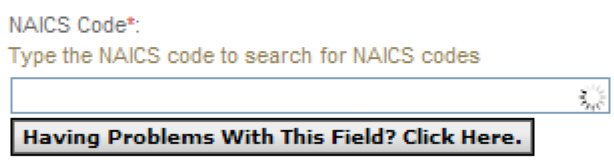
III. Alternatively, a user can type the code (e.g., "10" or "R") of the target value to navigate to the target selection and hit enter.

IV. 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.



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

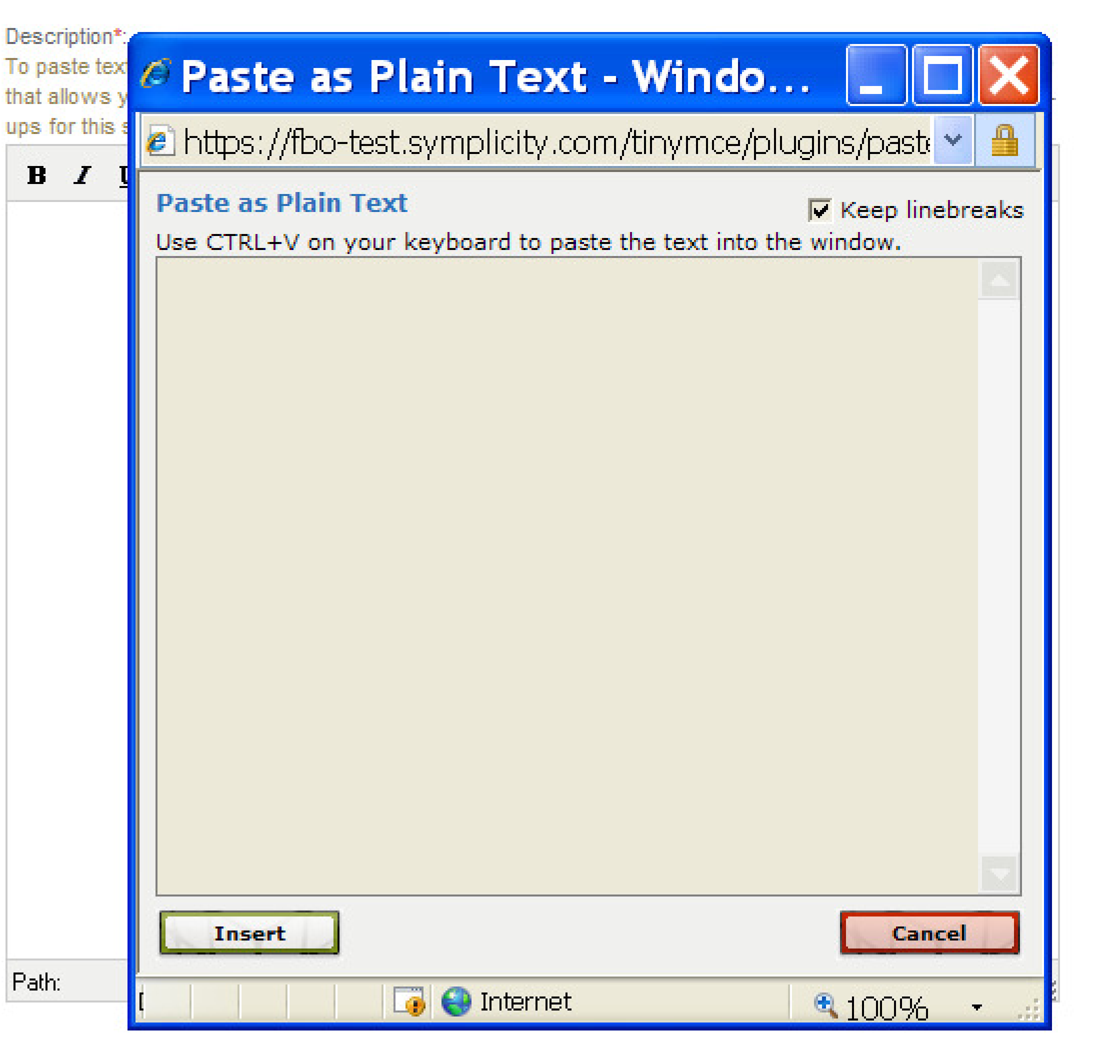
VI. Click the "having problems with this field, click here" button to have the system display a complete listing of NAICS codes which can be used for selection. Use the arrow key field to open a complete listing. Highlight the target code and hit enter.



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. Performing either action 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.

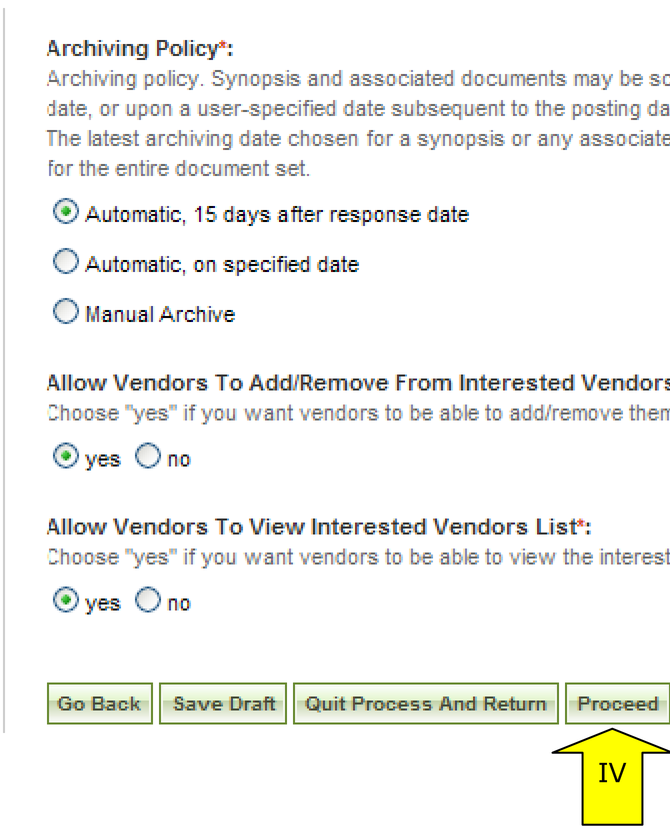


For the IVL (Interested Vendor List) fields, agency administrators can force agency solicitations to be configured a certain way on the two fields that pertain to IVL. If the IVL fields are not editable, the system is applying agency forced values for this setting. Contact you Agency Administrator for FBO if you have questions on these settings.

I. There are four options at the bottom of the form which the user can use.
II. The first is "Go Back". Use of this button takes the user back to step one.
III. 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:

IV. "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).
V. "Proceed" – takes the user to step three in the process.



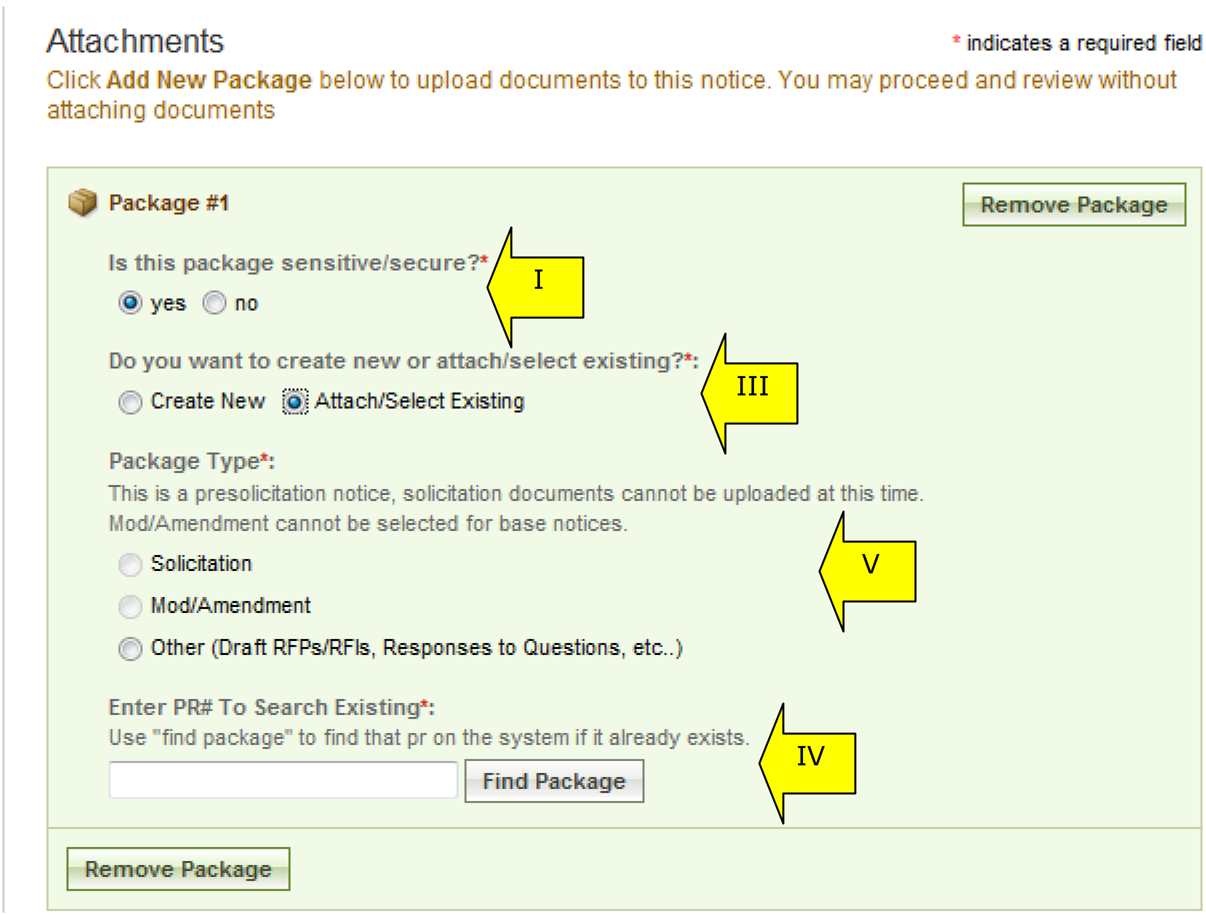
Step 3 – Attachments

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).

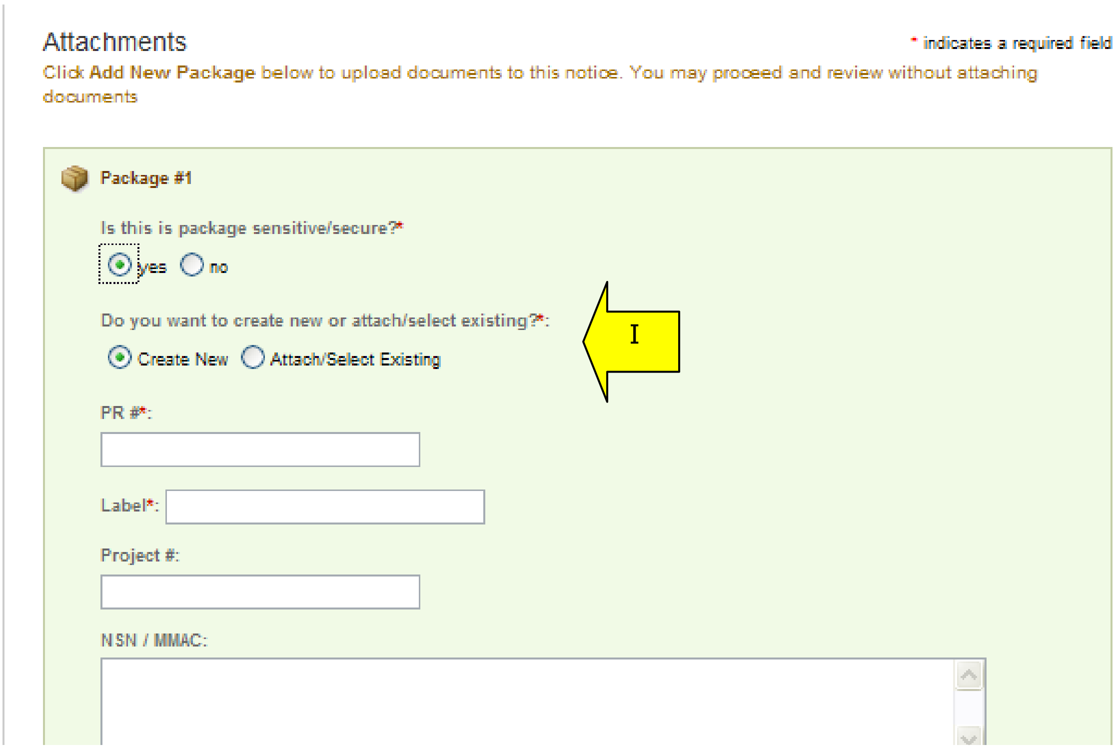
Controlled, Unclassified Attachments

NOTE: If export control or explicit access is required on any of the solicitation's controlled, unclassified packages, then all controlled, 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.

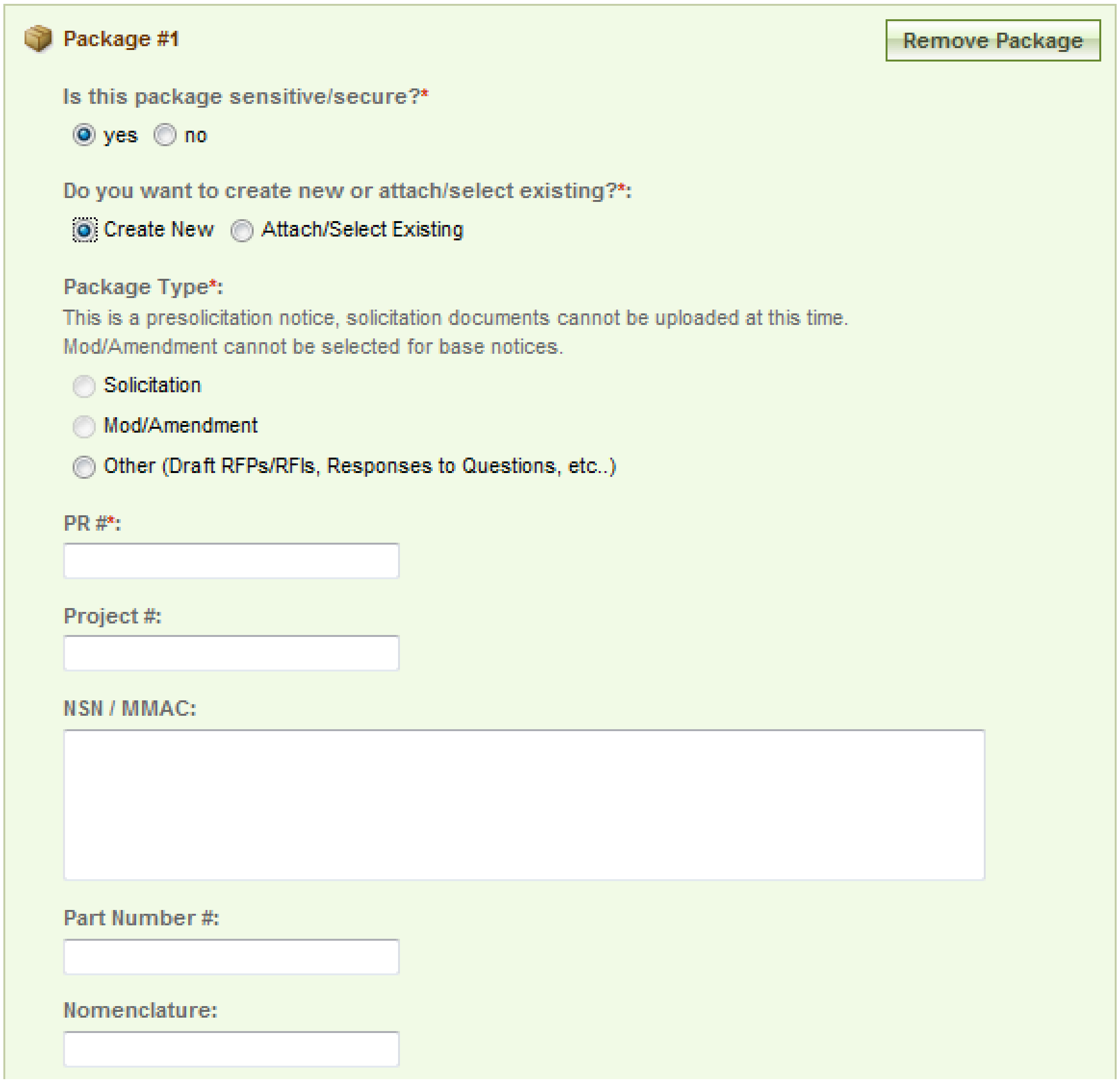
I. When a buyer is adding a new package, the first step is to indicate whether the attachment is a controlled, unclassified/secure package.
II. If "no," see below "Non-Sensitive/Secure Attachments".
III. If yes, this means the buyer wishes to attach a document that has been uploaded by an engineer (unless they are themselves an engineer as well). If the buyer indicates "yes", then the buyer is prompted to select the "PR#" from a list of available packages. If the buyer also has Engineer rights, they are able to create a new package at this time, otherwise, they can only select existing packages.
IV. The buyer is also given the option to manually enter the PR# and use the "find package" button.
V. The buyer must also indicate the "package type" (available package type options will align with the notice type).
VI. Once the secure package has been added, use "proceed" (bottom of form) to go to the next step.

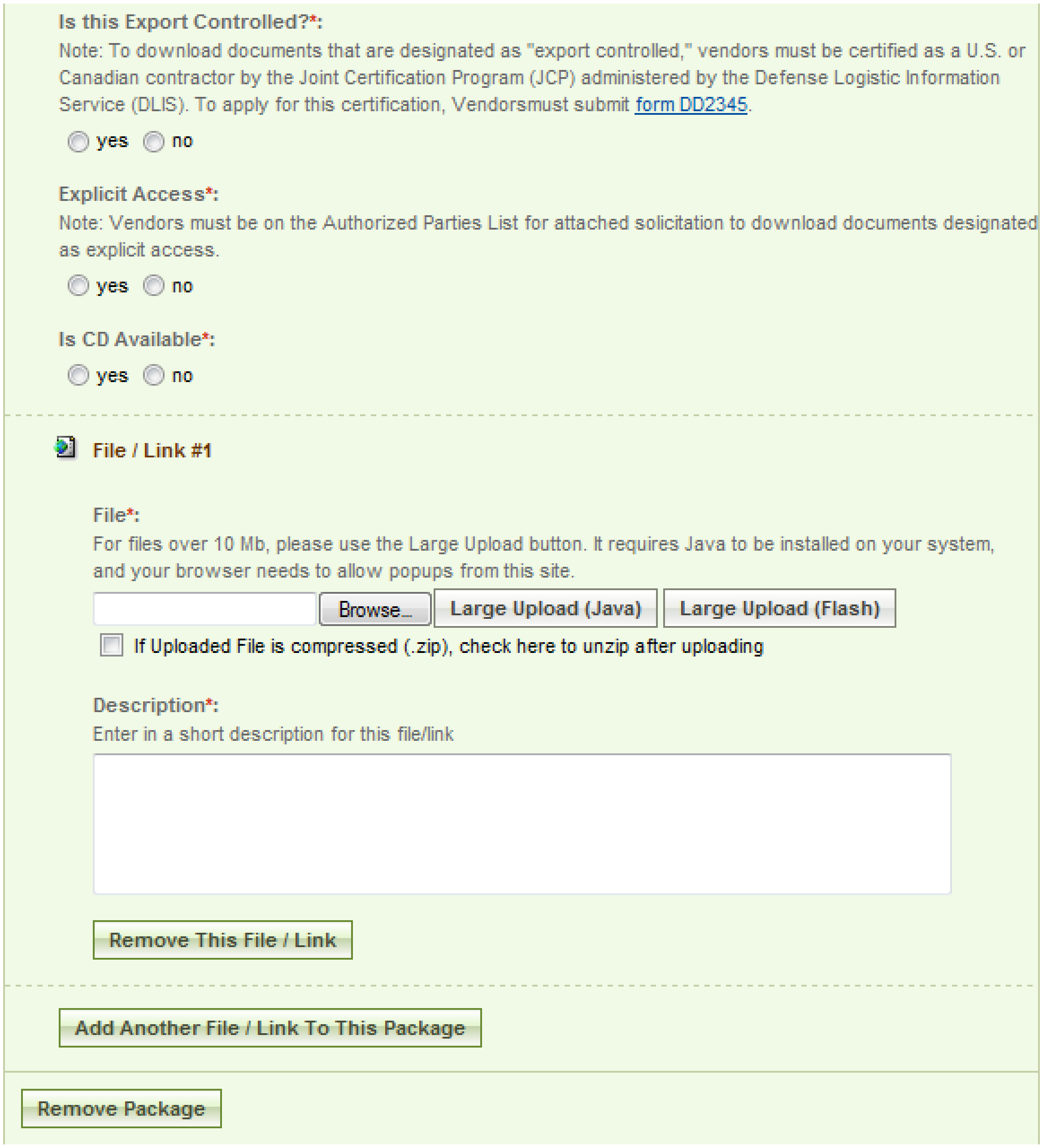


I. Buyers who are also "Engineers," will also be asked whether or not they want to create a new package. If yes, the form will allow the user to enter a new sensitive/secure document package. Buyers who are not also "Engineers" will be allowed to select a sensitive/secure package (created by engineer).



I. If adding new, a form will present that allows the user to set up the 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.

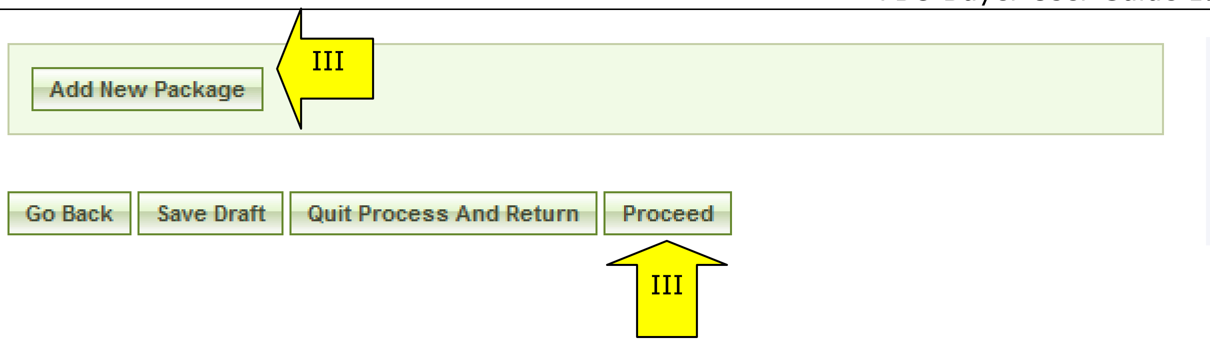




I. **Note -** There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

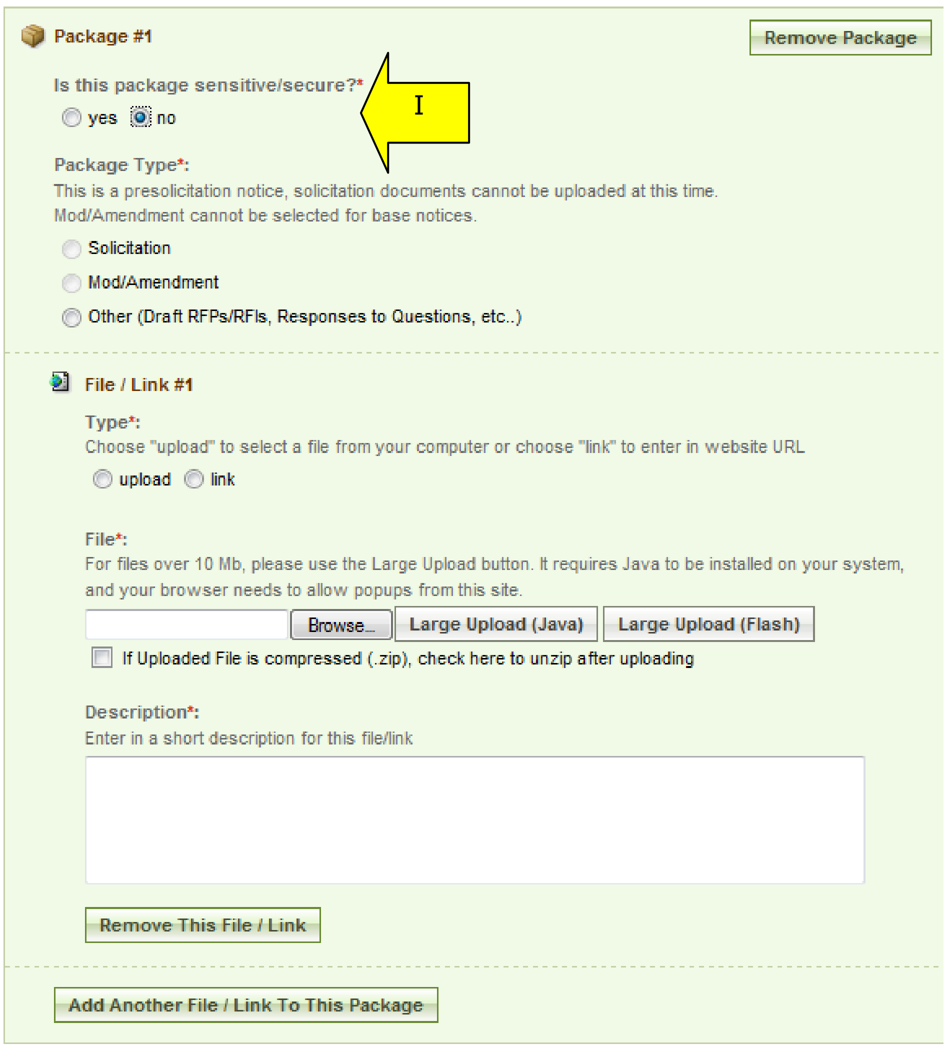
II. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.

III. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.


Add New Package
III
Go Back
Save Draft
Quit Process And Return
Proceed
III

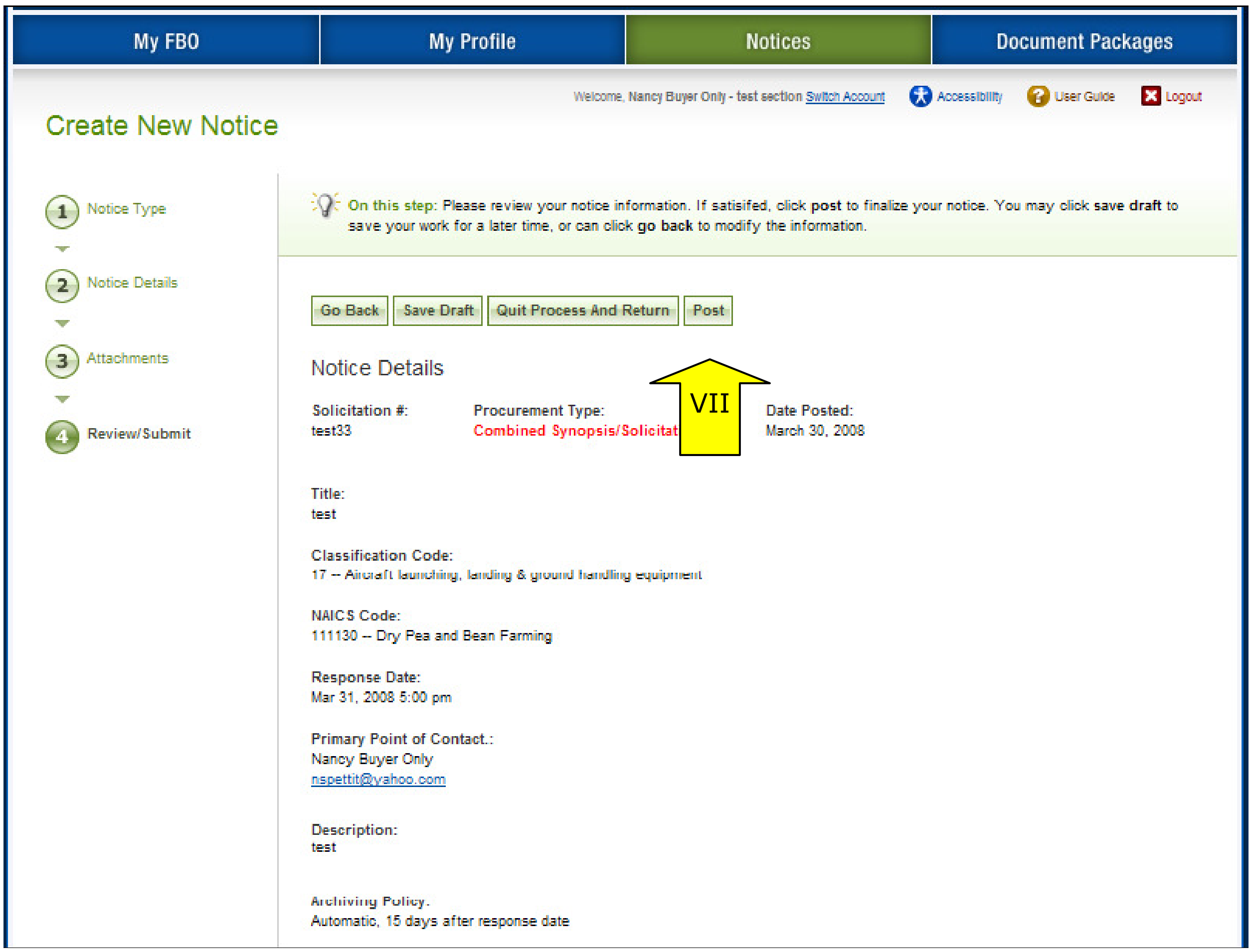
Non-Sensitive/Secure Attachments

I. If the user is attaching a document that is not sensitive/secure, 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.
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 (not shown in image).
VIII. "Save Draft" saves the materials to the draft notice (not shown in image).
IX. "Quit Process and Return" does not attach the materials (not shown in image).
X. "Proceed" takes the user to the next step in notice creation process (not shown in image).



Step 4 – Review / Submit (Note – If the Bid Module is enabled, 'Review / Submit' becomes Step 5 in the process. See section 3.4 for more details.)

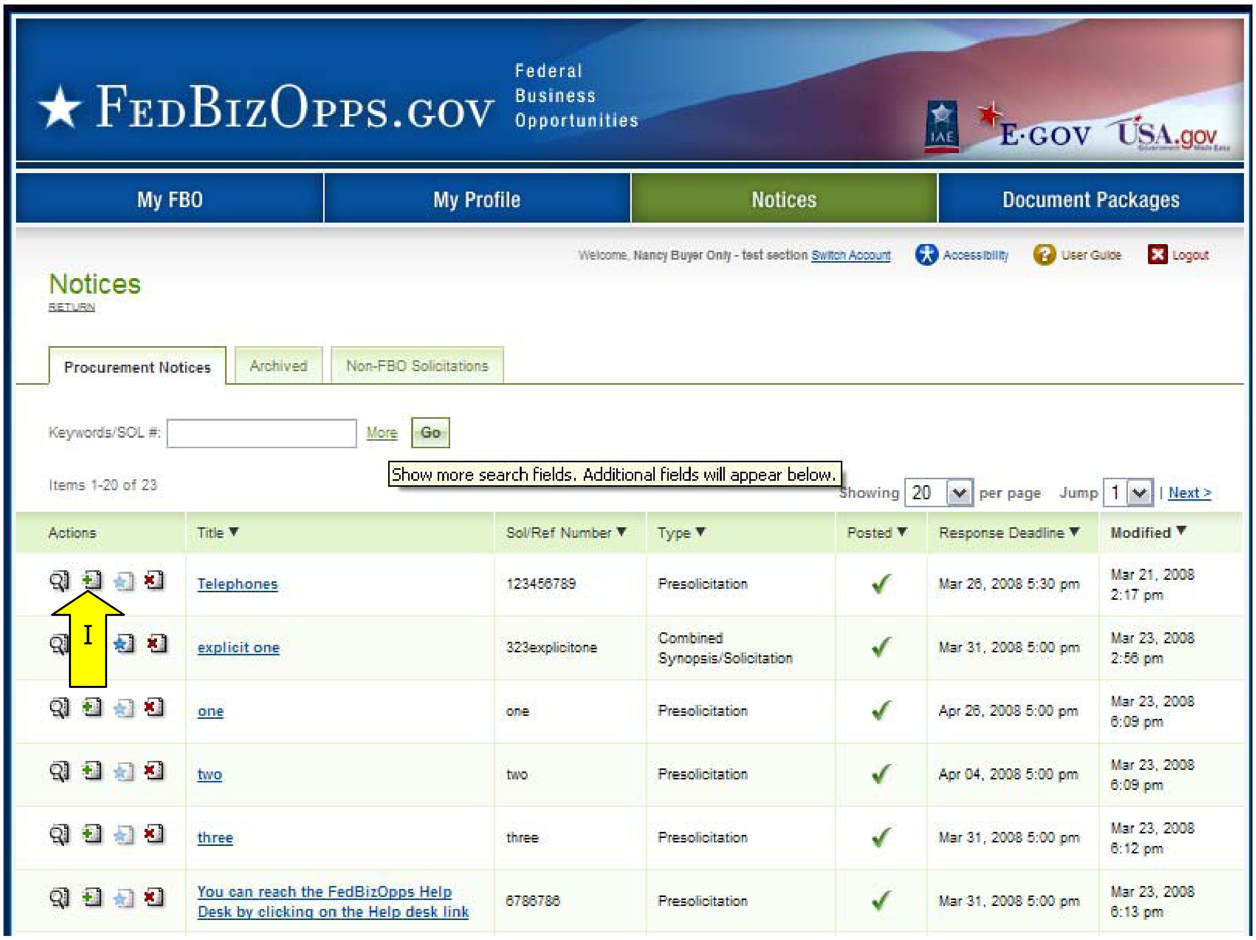
I. The fourth step allows the user to review the notice and attachments and to submit the notice.
II. The "go back" button takes user back in reverse order of the previous steps (3, 2, 1) and allows the user to edit data entered in earlier steps.
III. "Save Draft" saves the materials to the draft notice.
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 68 for more details.
VII. "Post" moves the notice for review by users.



3.3.2 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.

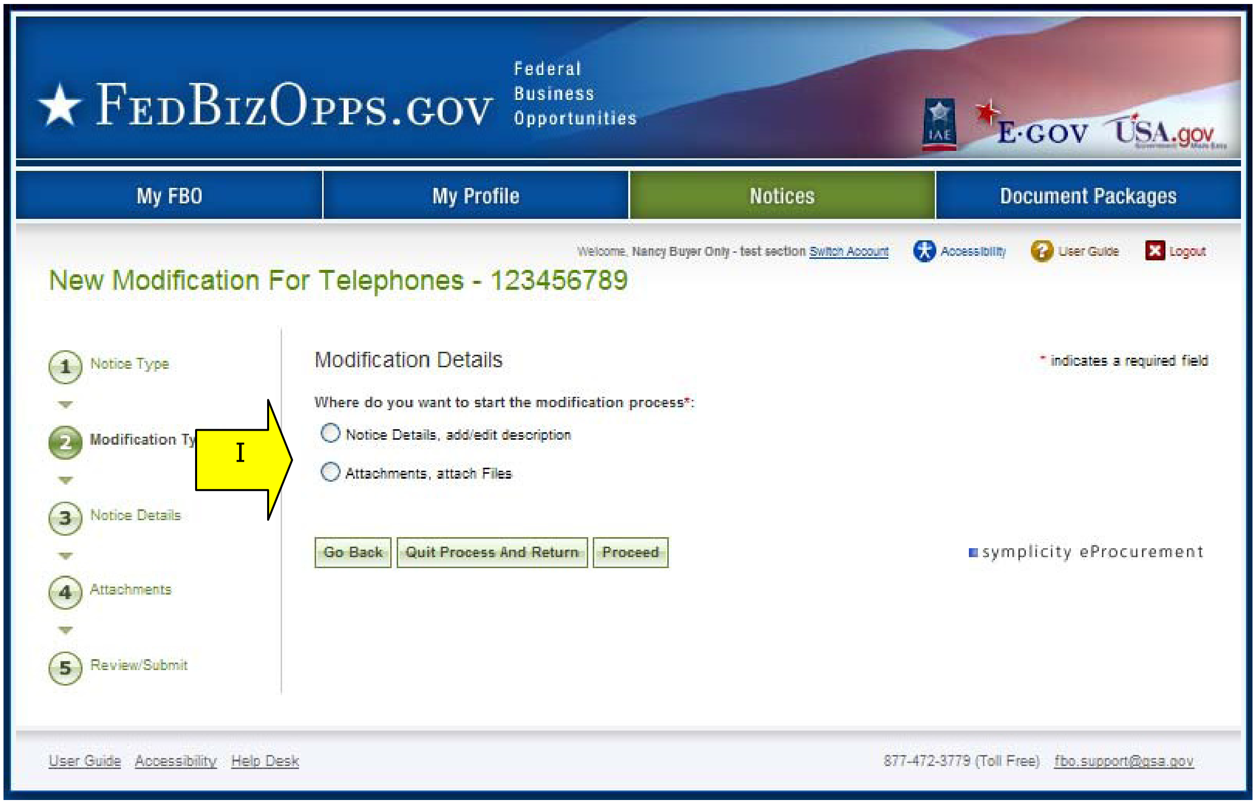


I. During the "modification type" step in the modify/amend process, the user indicates which step they would like to start with as they move forward:
   a. Add to or edit the description
   b. Attach files to the notice
   c. Note, if the Bid Module is enabled, there will be an additional option presented called "Bids (CLIN/Doc Packages)." See section 3.3.10 for more details.

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.

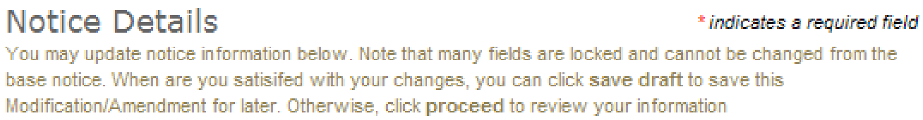
IV. If only attaching files, the user is taken directly to attachments.

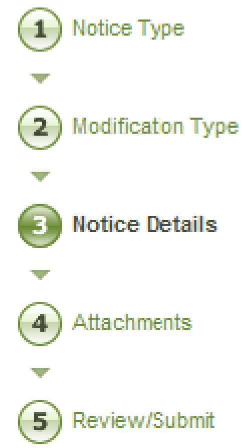


I. If the user indicates that they would like to add/edit the description, the system will prompt the user to specify whether the existing description should be modified or if the user would like to append a new text field to the notice that would be highlighted as newly added material (highlighted in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

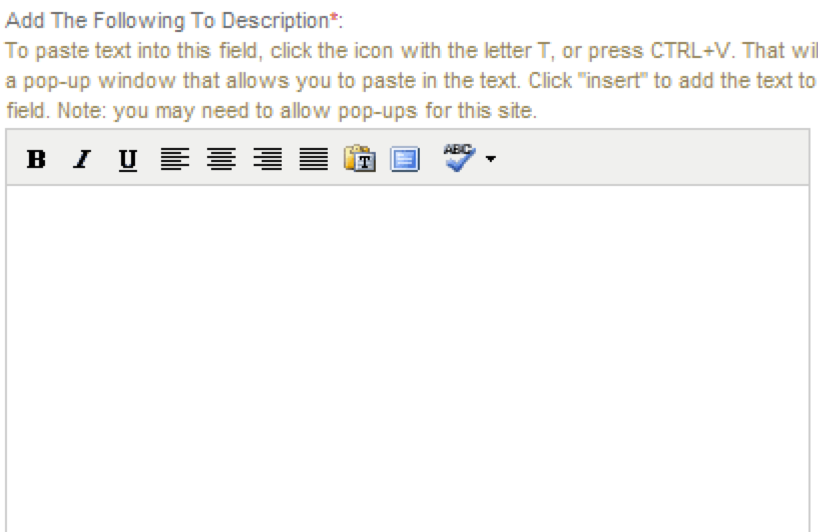
I. If editing the existing description, the user will be able to edit the existing description and other notice detail fields.

II.





III. 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).



IV. At the bottom of the form for step three, the "Go Back" takes the user back to step two in the process.

V. "Save Draft" saves the modification in draft notice.

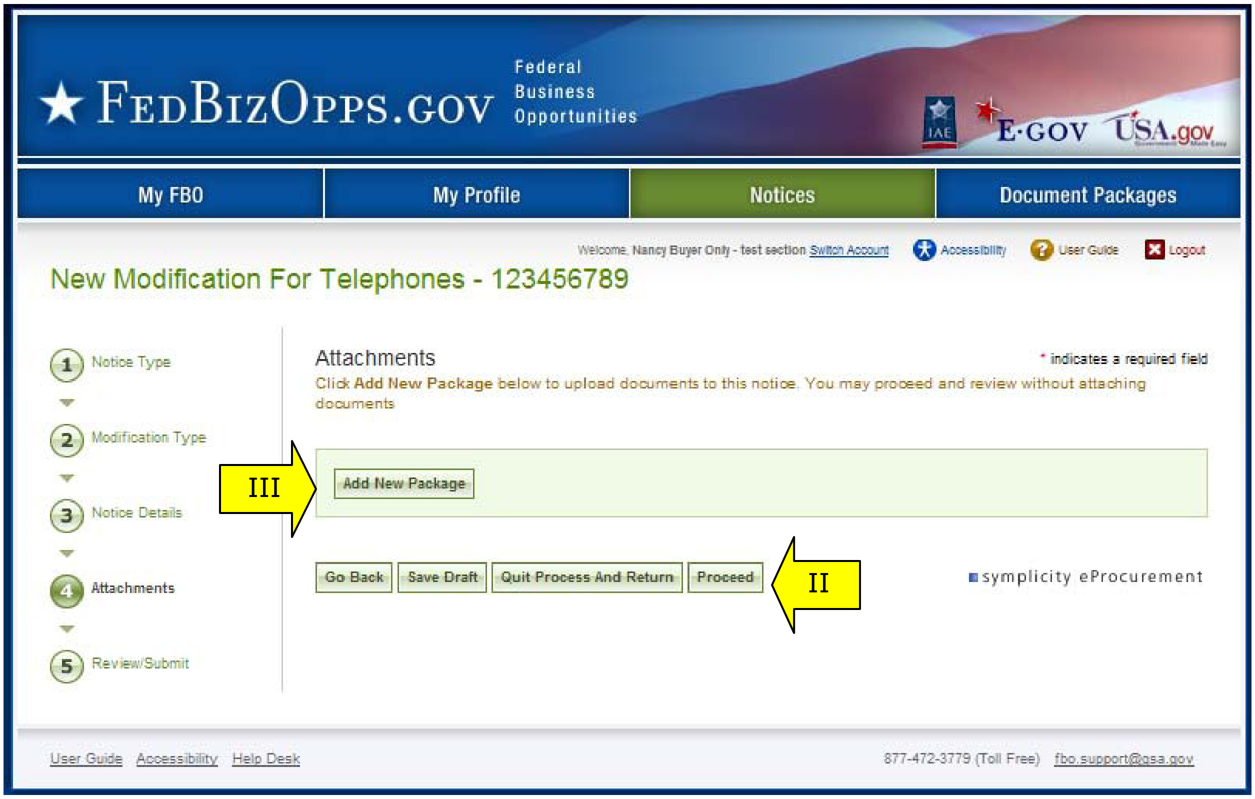
VI. "Quit Process and Return" does not save the modification.

VII. "Proceed" takes the user to the next step in notice modification process.

I. The fourth step allows the user to attach documents or packages to the notice. A Package is simply a collection of Documents bundled together for review.

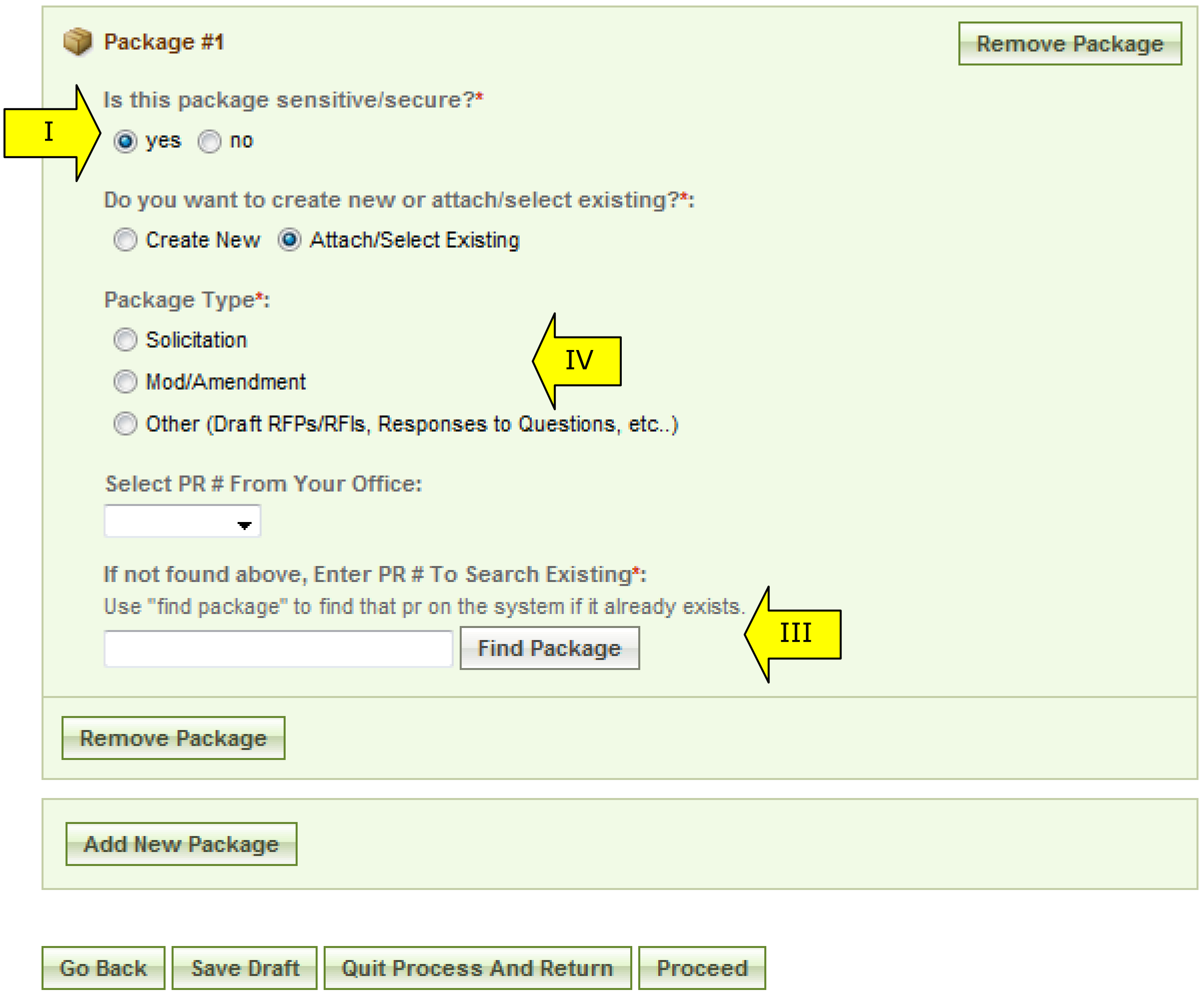
II. If a user does not wish to attach any documents/packages, they may use "proceed" button to move to the next step without attaching any documents.

III. Click "Add New Package" to upload documents to the notice. Users can either submit materials themselves, or attach secured documents (or both).



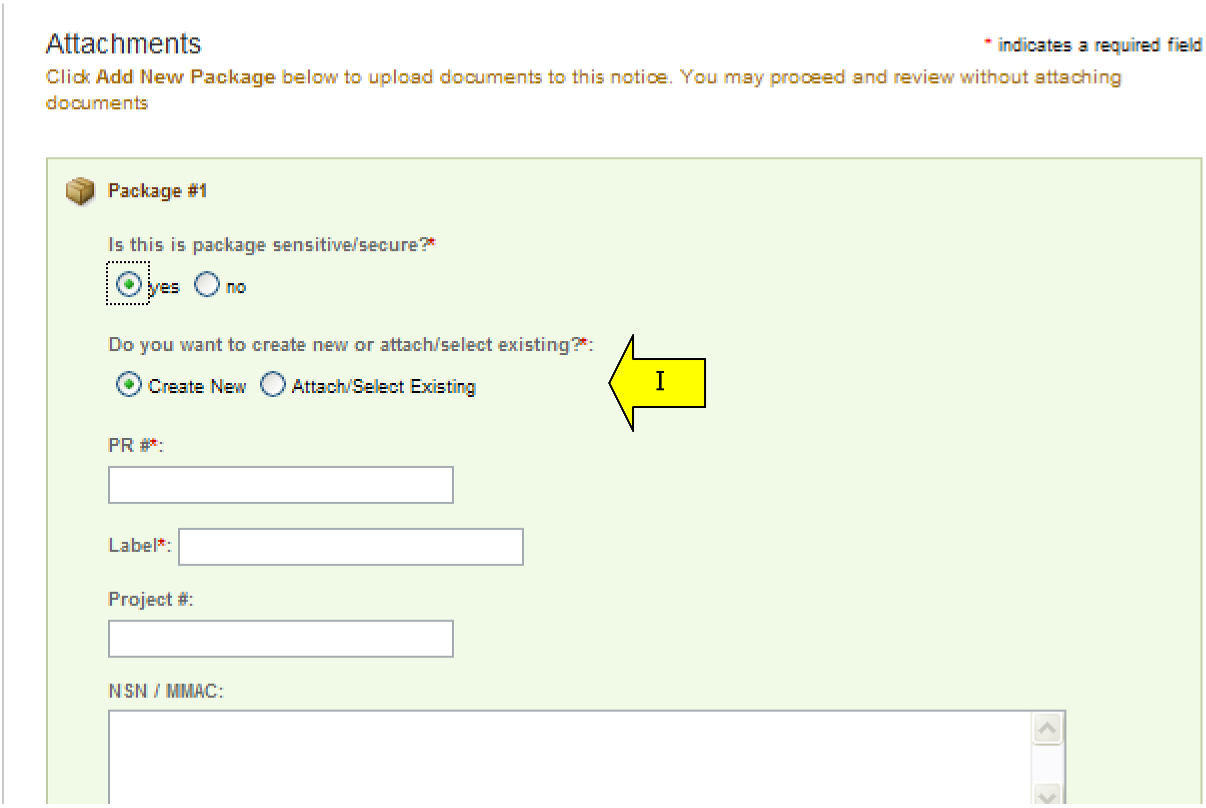
Controlled, Unclassified Attachments
NOTE: If export control or explicit access is required on any of the solicitation's controlled, unclassified packages, then all controlled, unclassified packages attached to that solicitation will take on those requirements. So for instance if "attachment A" is export 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 buyer is adding a new package, the first step is to indicate whether the attachment is a sensitive/secure package.
II. If yes, this means the buyer wishes to attach a document that has been uploaded by an engineer (unless they are themselves an engineer). If the buyer indicates "yes", then the buyer is prompted to select the "PR#" from a list of available packages.
III. The buyer is also given the option to manually enter the PR# and use the "find package" button.
IV. The buyer must also determine the "package type" (the options will align with the notice type).



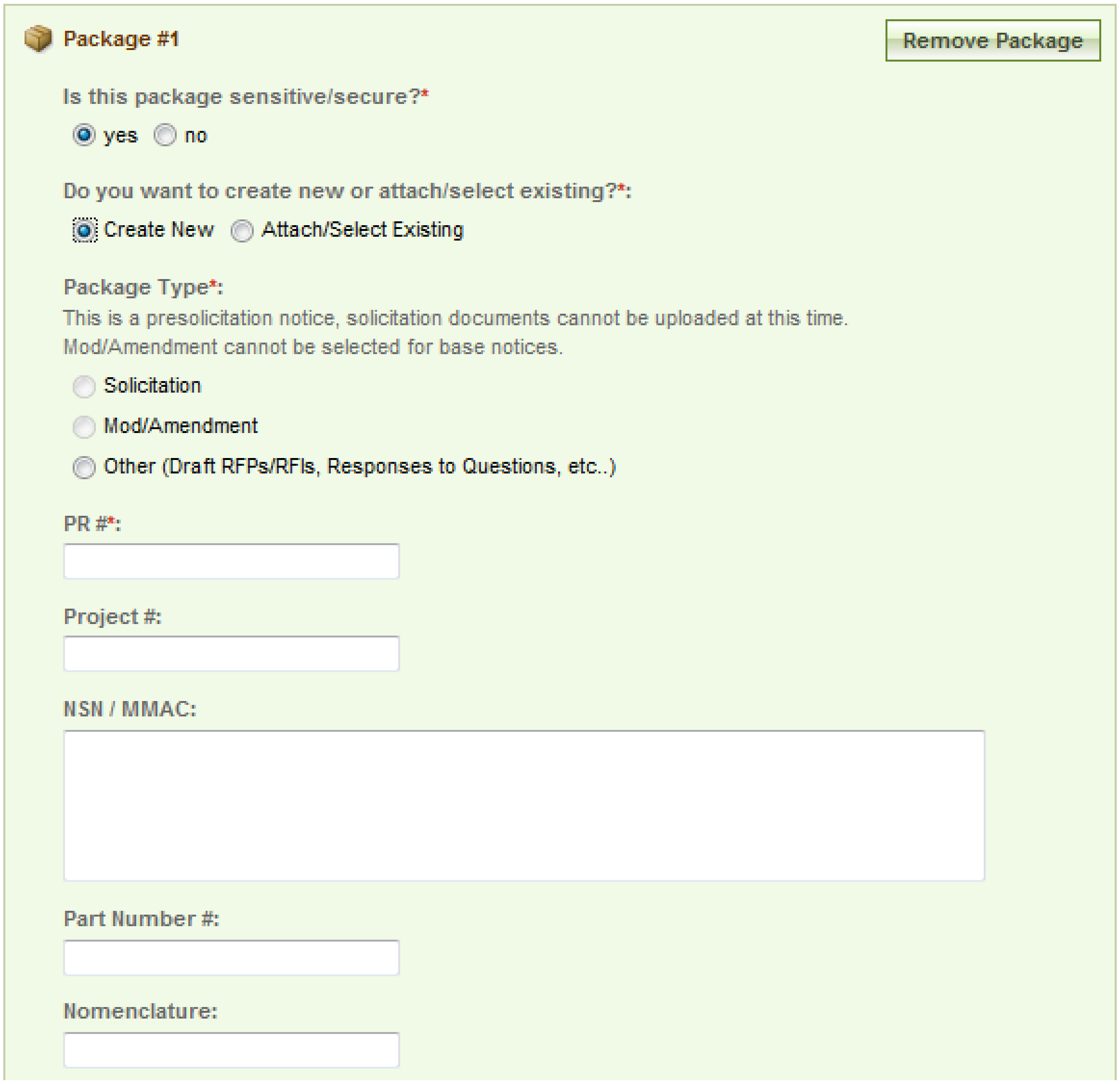
V. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.

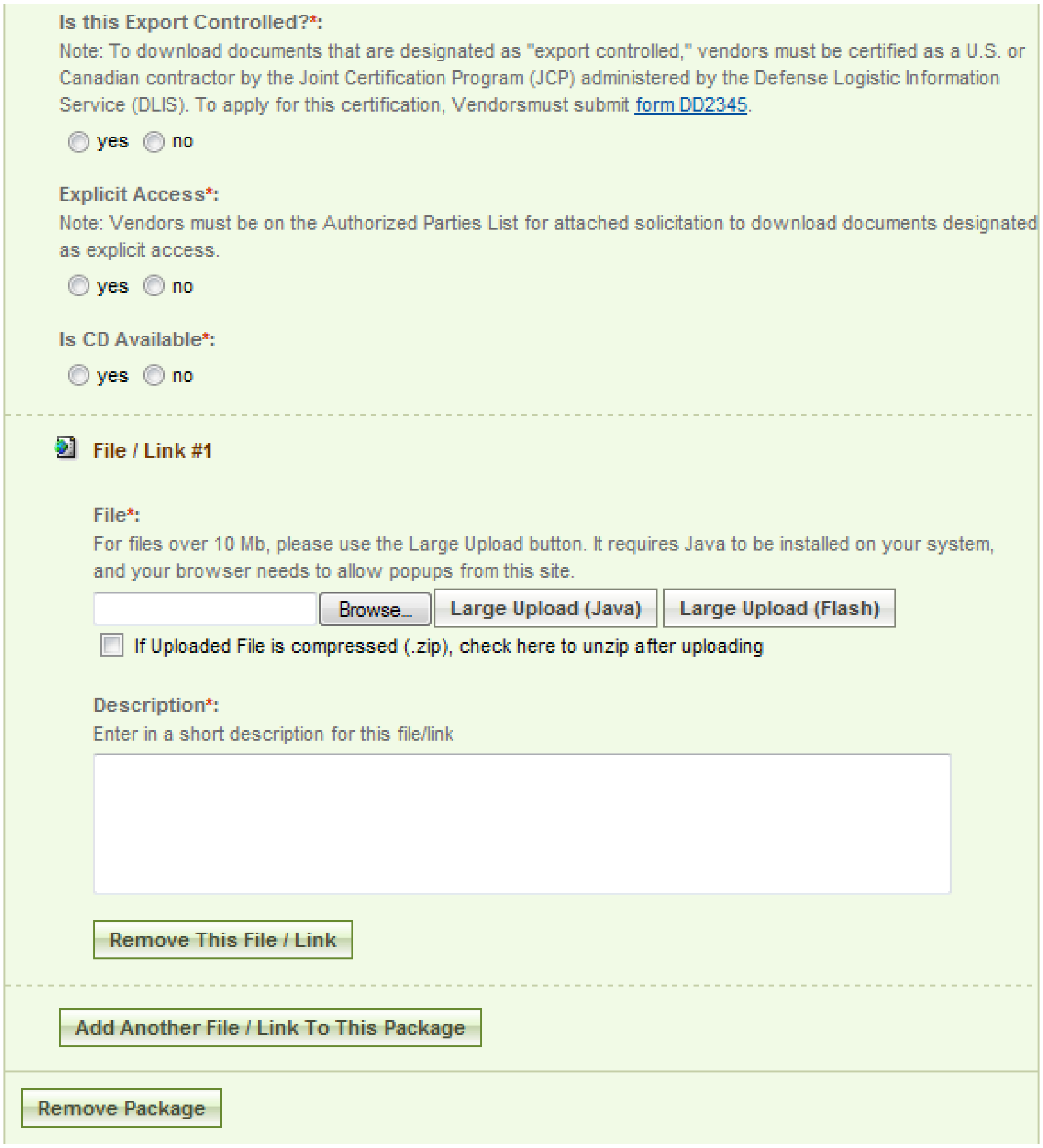
I. If attaching controlled, unclassified packages, the user is given the option to create a new package (if user has Engineer User rights) or to select an existing (enter the PR# and use the "find package" button.



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.

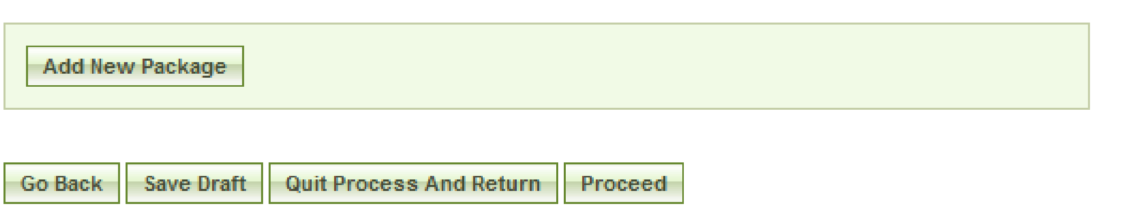




I. **Note -** There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

II. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.

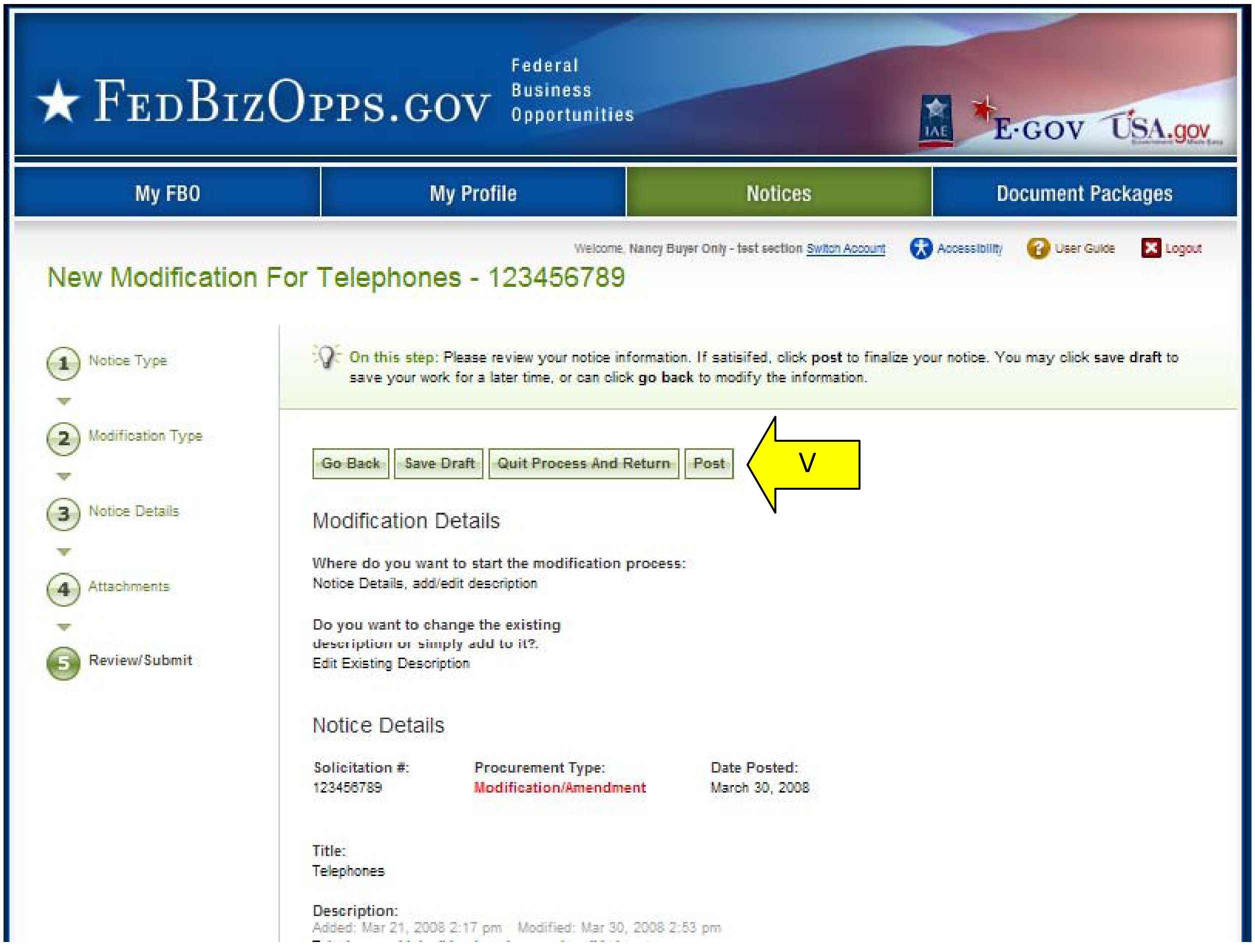
III. Once the secure package has been added, use "add new package" to add another package or "proceed" to go to the next step.



<u>Non-Sensitive/Secure Attachments</u>

I. If the user is attaching a document that is not sensitive/secure, 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. **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. 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.
VI. Users are required to enter a description of the package.
VII. After the document has been added, the user can add another document to this package or add another entirely new package.
VIII. “Go Back” button (bottom of form) takes the user back to step two in the process.
IX. ”Save Draft” saves the materials to the draft notice.
X. “Quit Process and Return” does not attach the materials.
XI. “Proceed” takes the user to the next step in notice creation process (not shown on image).

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.

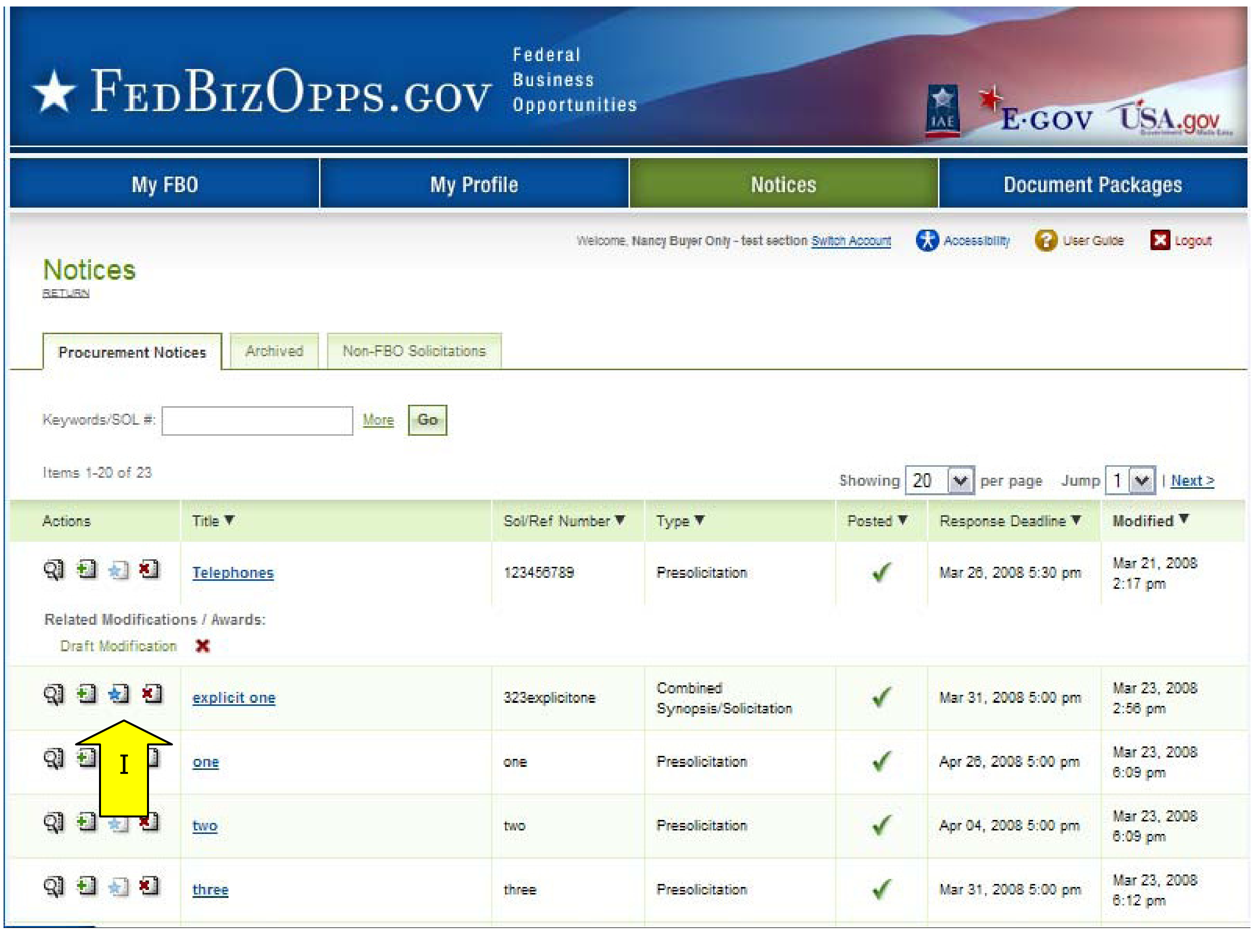


3.3.3 Create Award

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.



I. At step two of the 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, Contractor Awarded Address and DUNS Number are not required fields.

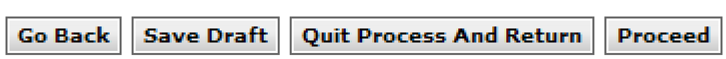
III. The form is too long to capture in a screen shot. Users should work through the form in sequence.

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.

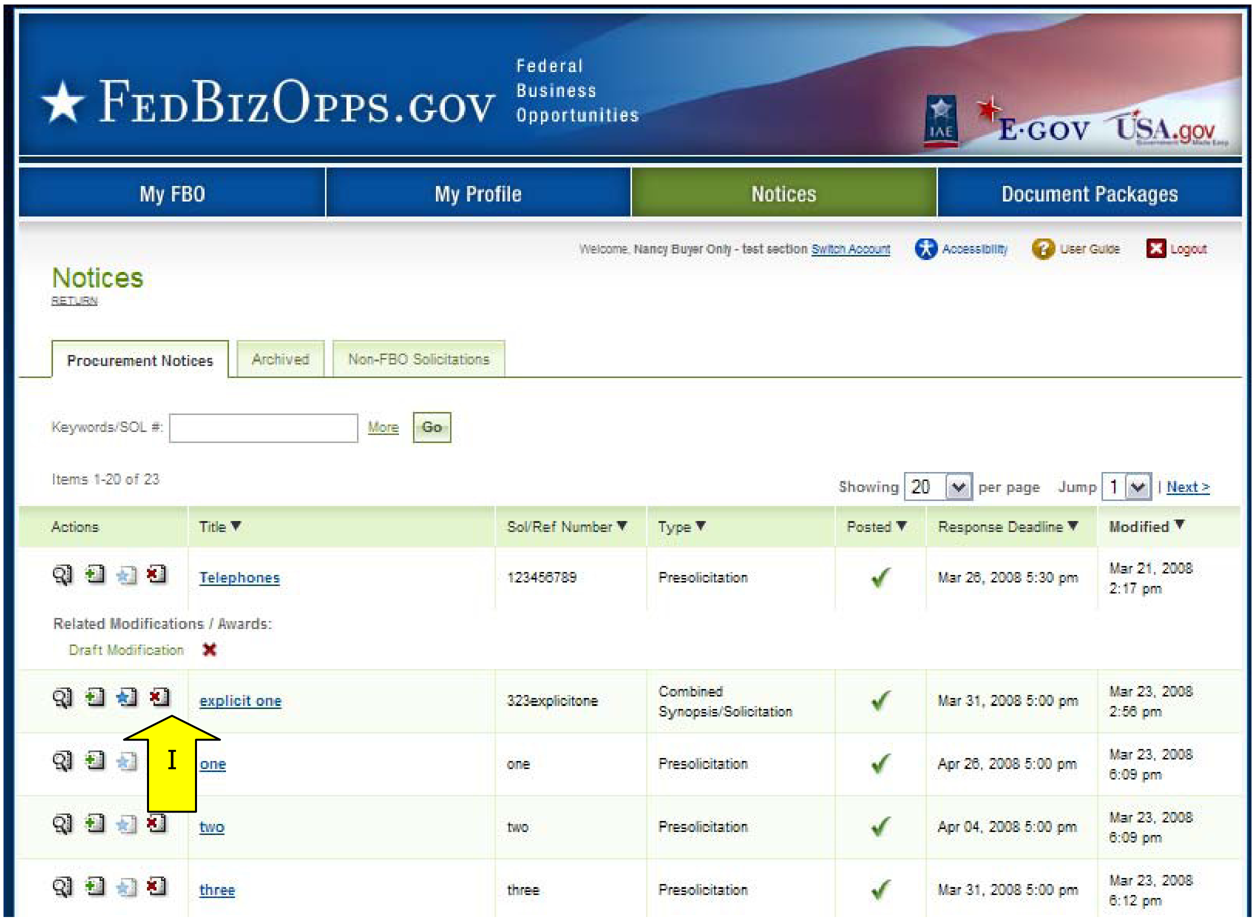
III. Click “Add New Package” to upload documents to the notice. Users can either submit materials themselves, or attach secured documents (or both).

I. At step four 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.

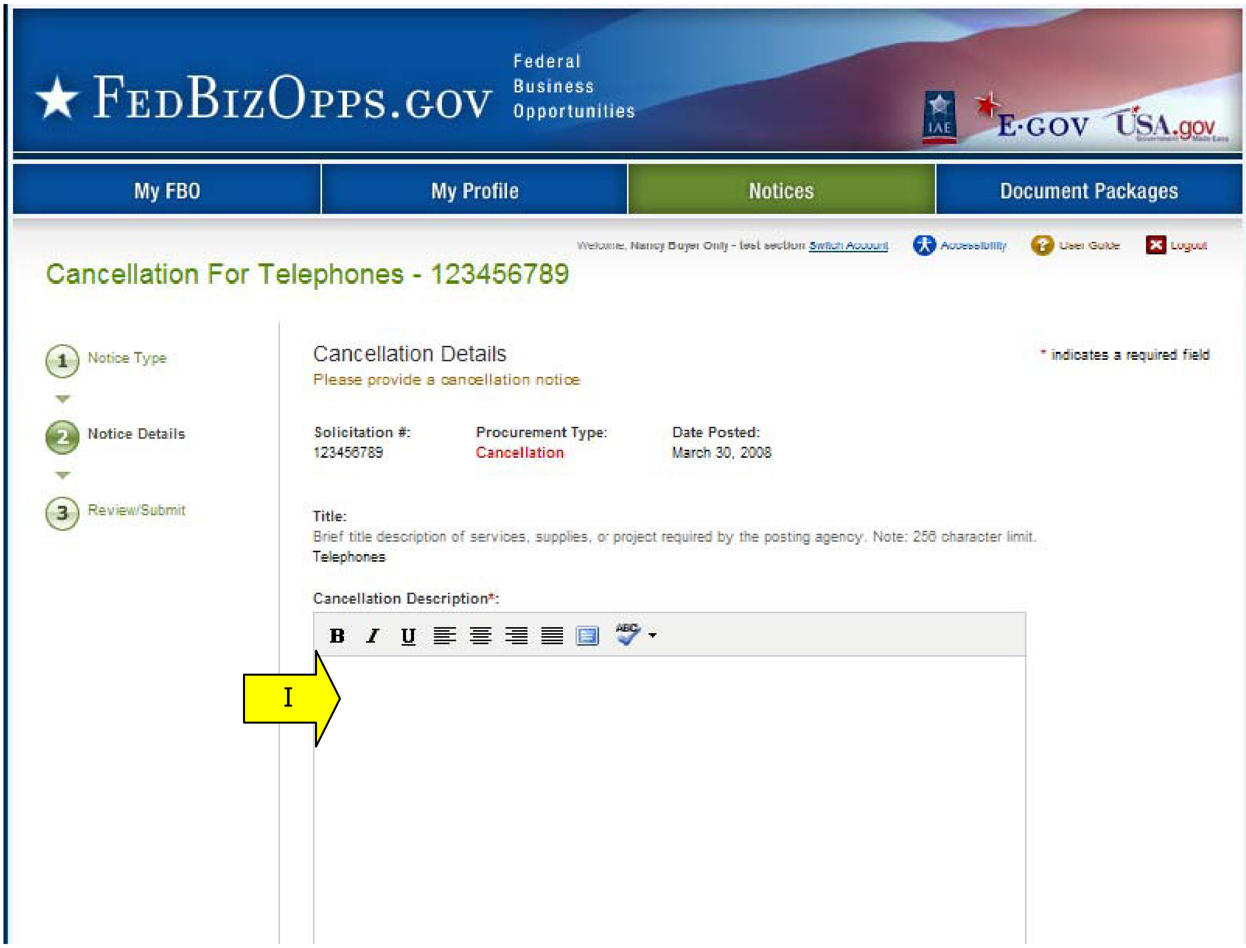
3.3.4 Cancel Notice

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:

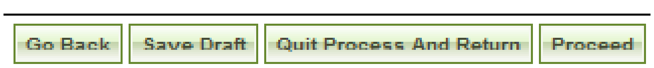

II. Additionally, a user can use the quicklink "cancel notice" on their "My FBO" page to cancel a notice.



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.



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 vendors.

3.3.5 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.

I. Within the notice use the "proceed" option to move forward to the "review/submit" step "

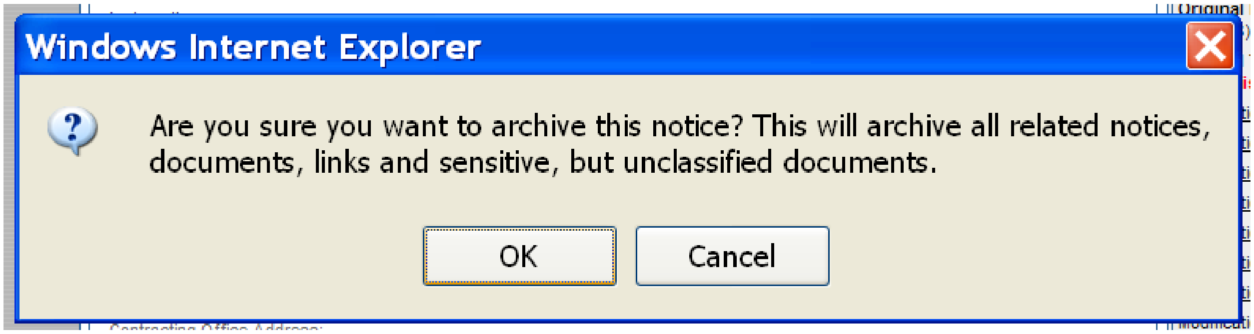
II. When on the Review/Submit step, if the user selects "delete," they will be asked to confirm that they indeed want to delete the item. This is important to consider, as deleted drafts do not go to archives and because the process of deletion cannot be undone.

3.3.6 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.

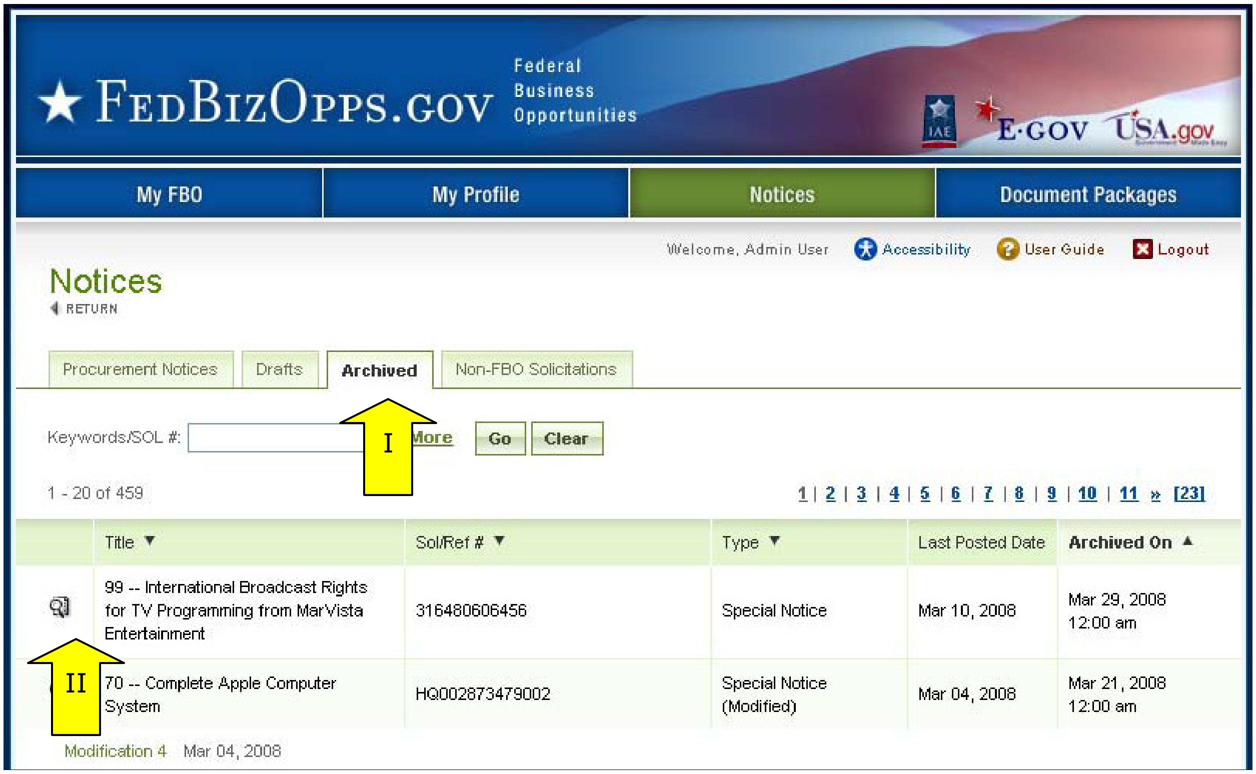
II. When the notice information tab is open, select the "archive" button to archive the notice.

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

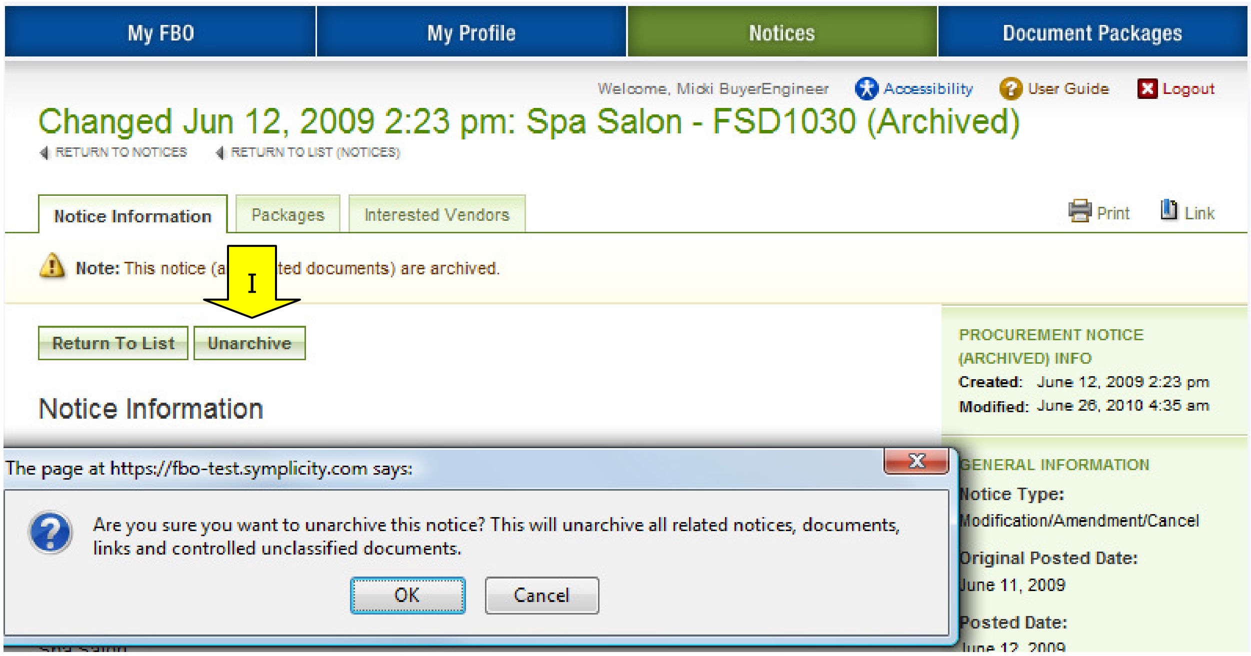


3.3.7 Unarchive Notices

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.



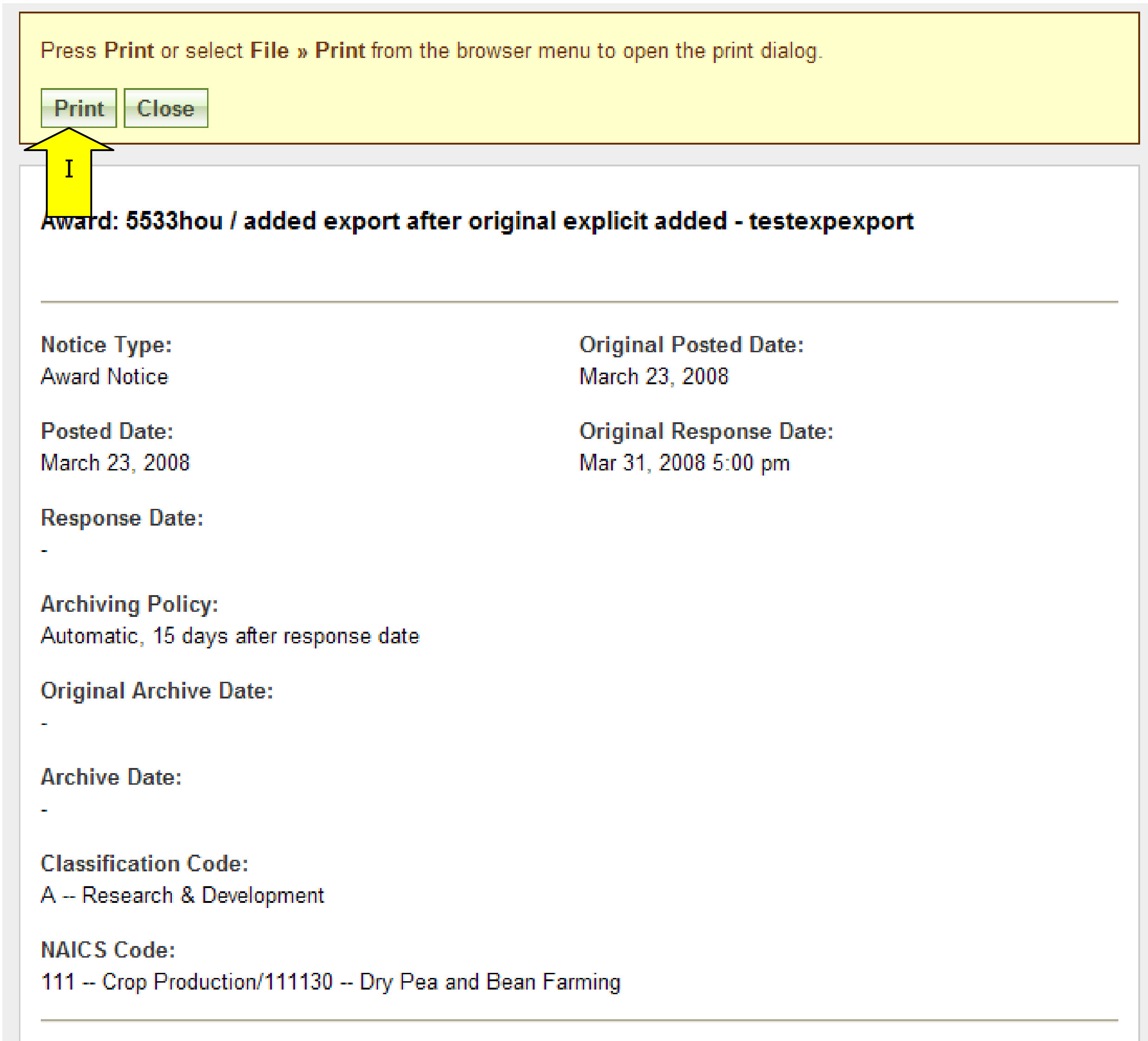
I. Select "unarchive" to return the notice and associated documents to active status.
II. The system will prompt the user to confirm this operation.



3.3.8 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.

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



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

3.3.9 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.

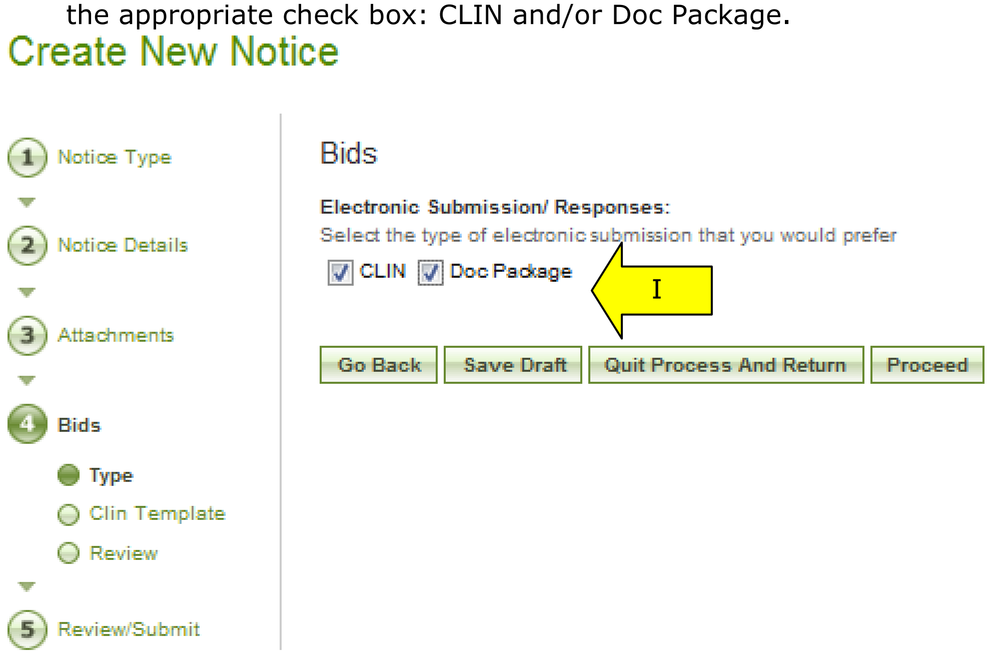
II. Go to the "interested vendors" sub-tab.

3.4 Manage FBO Notices with Bid Module Enabled

3.4.1 Create Notice

The Bid Module functionality allows buyers to receive and electronically evaluate vendor responses to notices. If this feature is enabled by the Location Administrator, there will be an additional step included in the "Create Notice" process outlined in section 3.3.1 called "Bids." Note, Location Administrators can choose to enable or disable the two response types (CLIN and Doc Package) independently from one another.

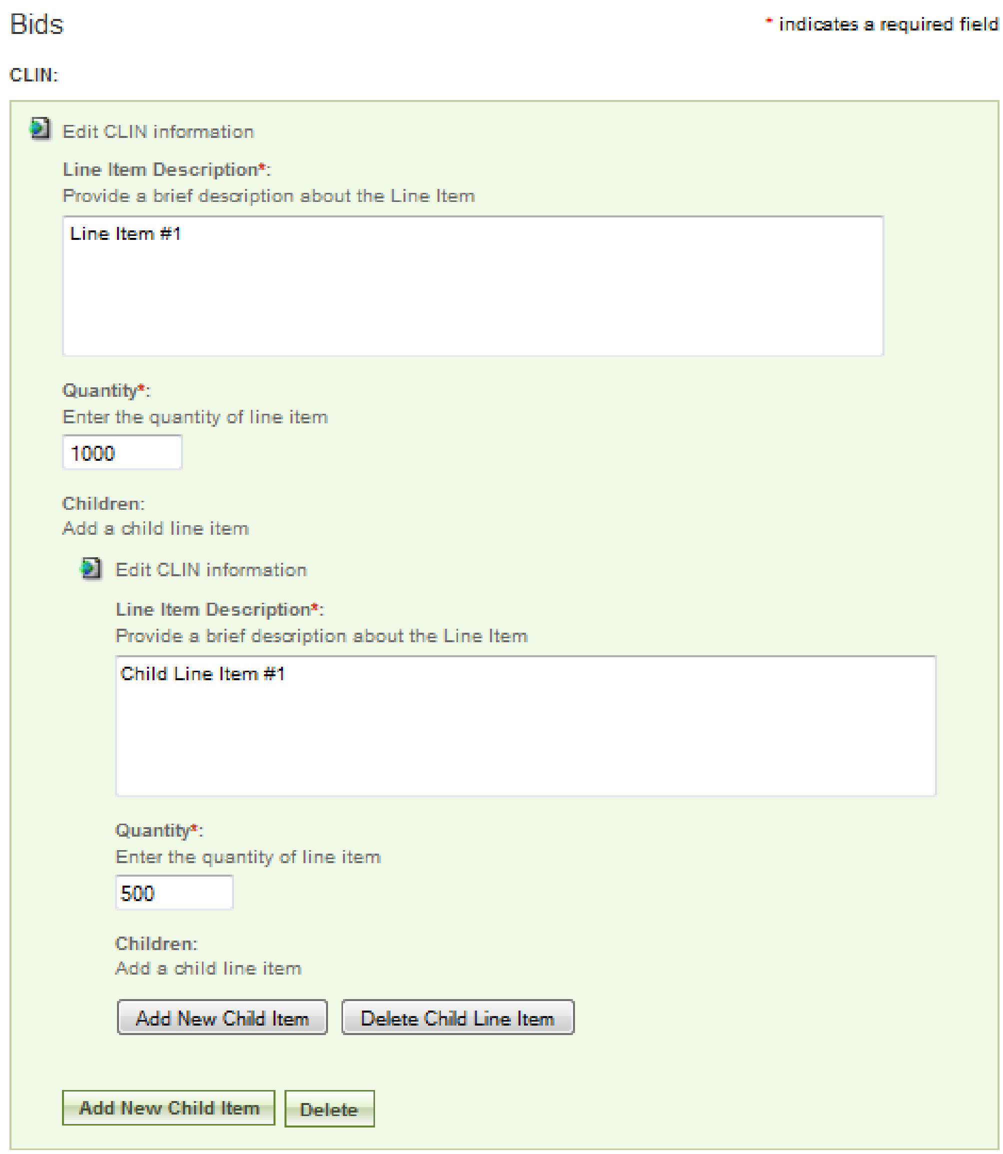
I. After completing step three "Attachments" and clicking "Proceed," the next step is to indicate the preferred type(s) of electronic submission for the notice by clicking on the appropriate check box: CLIN and/or Doc Package.



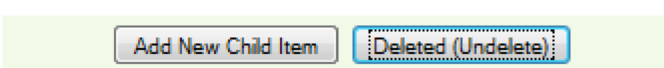
II. By selecting "CLIN," the buyer enables an online Item (CLIN) builder which will serve as a template for the items that vendors will be requested to quote on.

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.

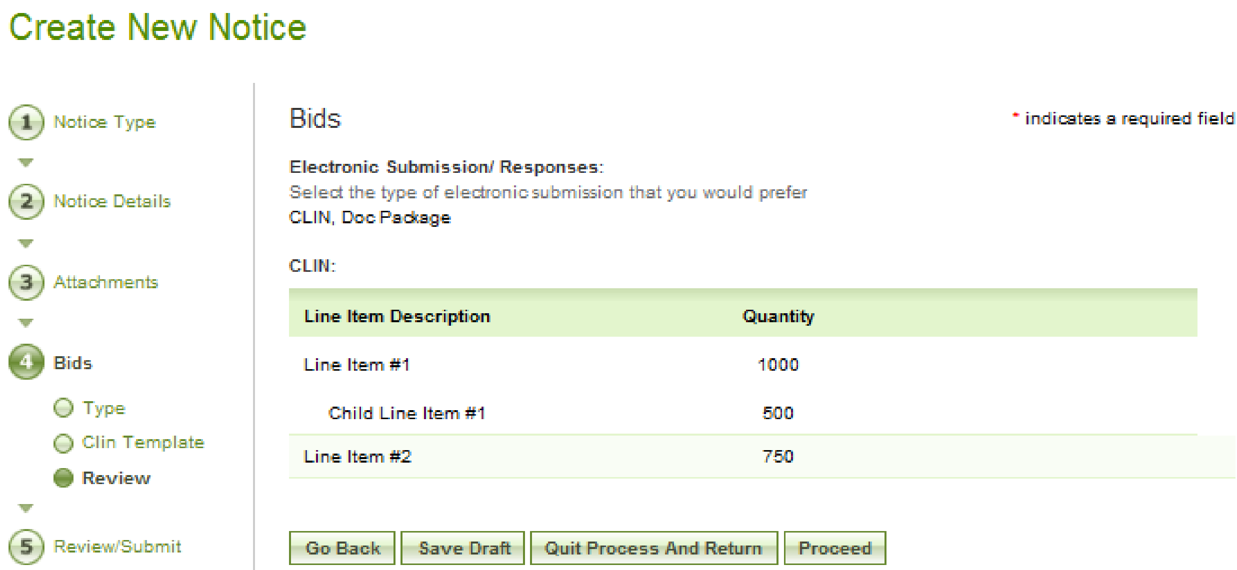


e. "Delete:" Buyer can use this button to delete parent and/or child line items at any time during this process.
f. "(Undelete):" If Buyer deletes a line item, the button will change to allow the buyer to "(Undelete)" the line item which will retain the values entered previously.



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.



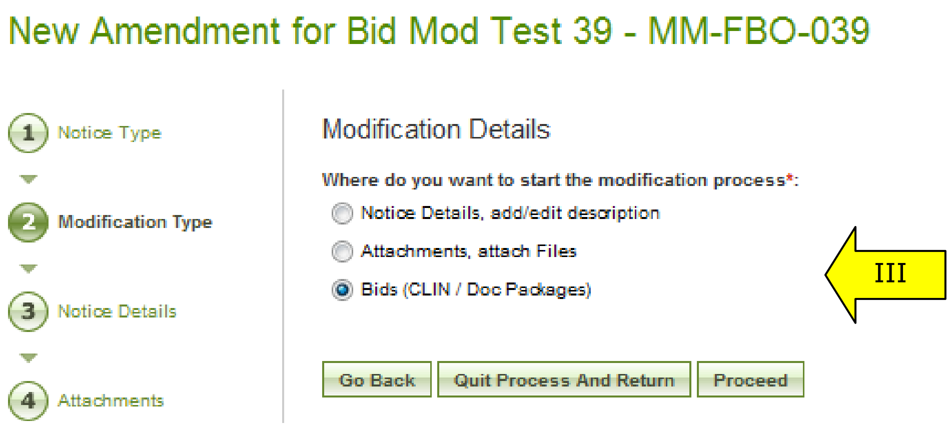
VII. The Buyer has four options at the bottom of this page:
   a. "Go Back" returns to the previous step in the process where changes can be made;
   b. "Save Draft" saves data entered up to this point for later edits/review;
   c. "Quit Process And Return" means that the solicitation will not be saved if selected when the notice was not previously saved as a draft;
   d. "Proceed" takes the user to the next step in the process, "Review/Submit." See section 3.3.1 "Create New Notice" for more information on the next step.

3.4.2 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:

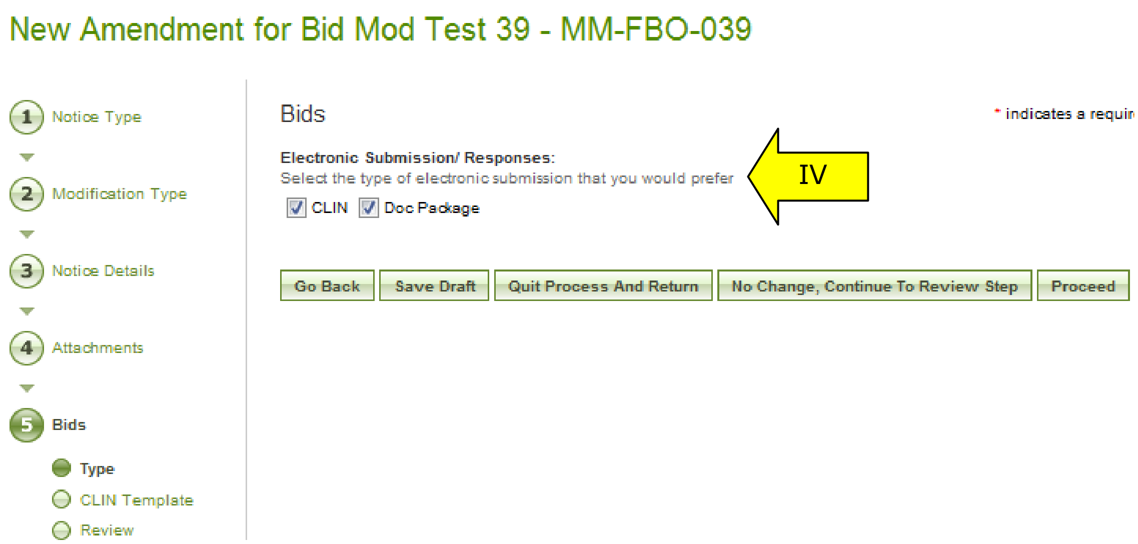

II. Additionally, a user can use the quicklink "Mod/Amend Notice" on their "My FBO" page to modify / amend a notice. (See section 3.3.2, page 43 for a screen shot.)

III. During the "modification type" step in the modify/amend process, the user indicates at which step they want to start the modification process:
   a. add to or edit the description (see section 3.3.2)
   b. attach files to the notice (see section 3.3.2)
   c. bids (CLIN/Doc Packages)



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.

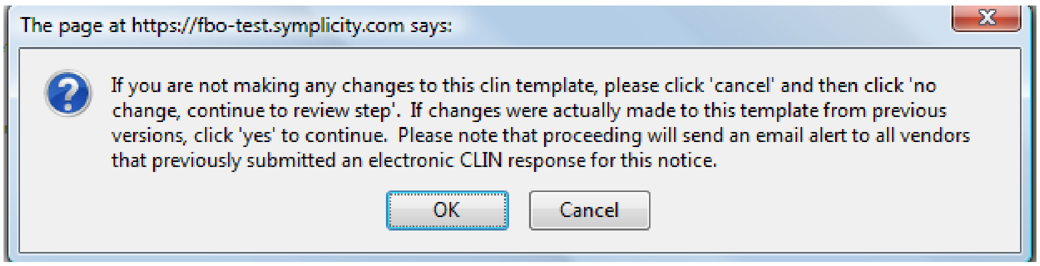


VI. At the bottom of the form for step five "Bids - Type," there are five options:
   a. "Go Back" takes the user to step four Attachments;
   b. "Save Draft" saves the modification in draft notice;
   c. "Quit Process and Return" does not save the modification;
   d. "No Change, Continue to Review Step" 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:
a. "Go Back" takes the user to step five "Bids - Type;"
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; note, if the user selects "Proceed," the system will provide the following warning message:

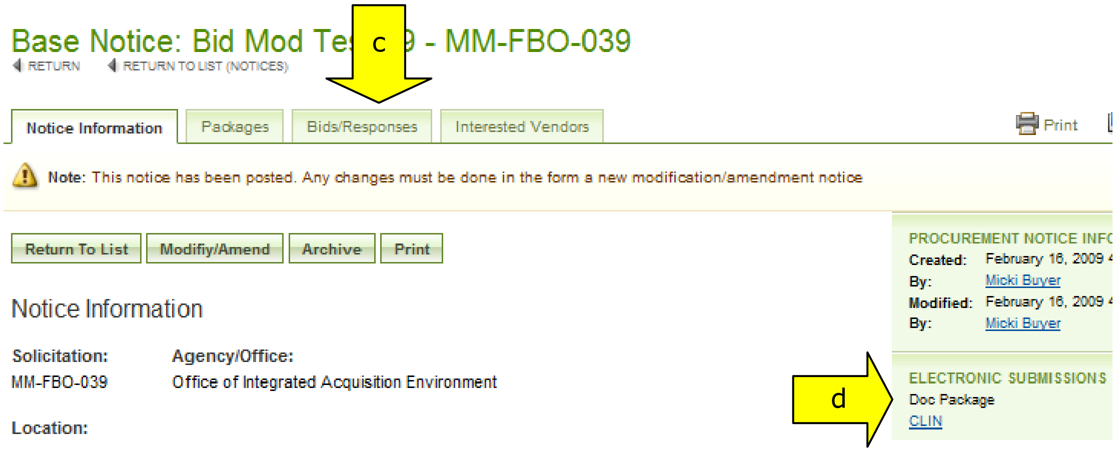


IX. After clicking "OK," the system will move to the next step, "Bids – Review" at which point the user can review the type(s) of electronic submission selected, if any, as well as the CLIN template created, if applicable. There are four options at the bottom of the review page:
a. "Go Back" takes the user to step five "Bids – CLIN Template;"
b. "Save Draft" saves the modification in draft notice;
c. "Quit Process and Return" does not save the modification;
d. "Proceed" saves any changes made to the Bids section and takes the user to the next step in the modification process.

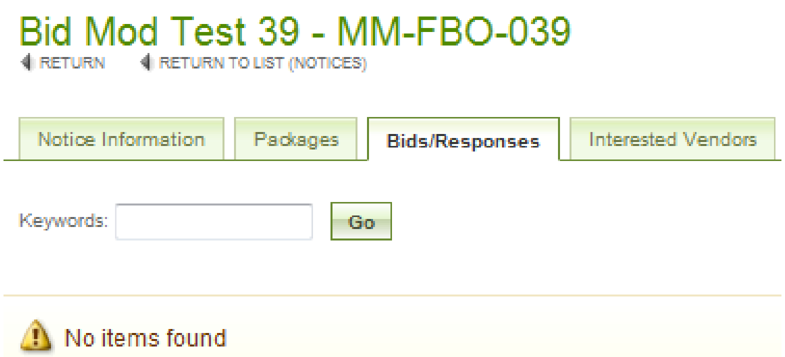
X. At step six, the user is able to review materials, and if appropriate to "post" the modification/amendment for vendor review; see section 3.3.2 page 53 for more information on this final step in the modification process.

3.4.3 Manage Vendor Electronic Responses

I. A buyer can review vendor electronic responses by following the below steps:
a. Go to upper navigation "Notices" button or click on the "Active Procurement Notices" link on the "My FBO" page under Statistics.
b. 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: 
c. 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.
d. 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.

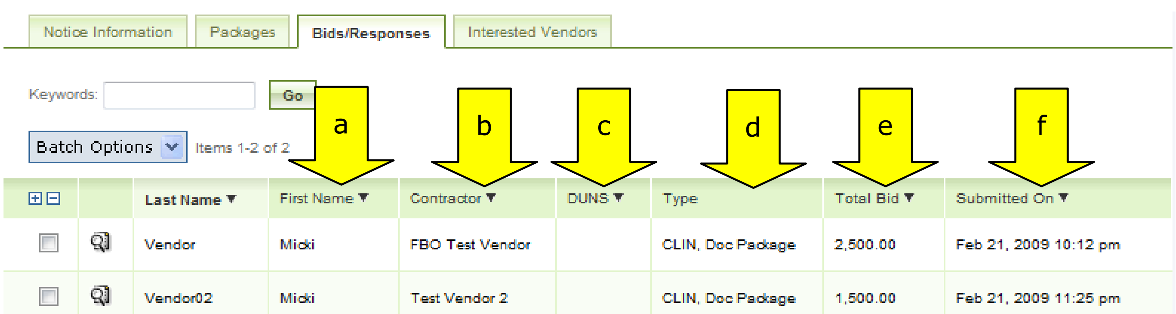


II. If there are no vendor electronic submissions, the tab will indicate no items found:



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

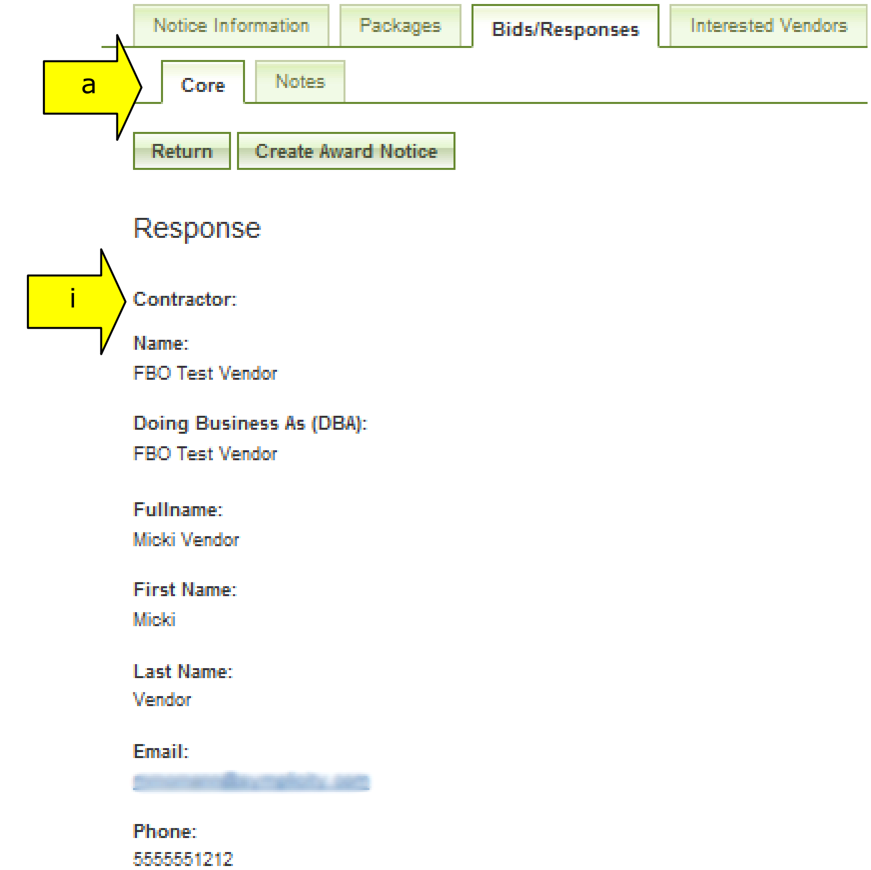
a. Vendor's first and last name;
b. Vendor's company name;
c. DUNS if available;
d. Type(s) of electronic submission;
e. Total Bid amount;
f. Date the response was submitted.



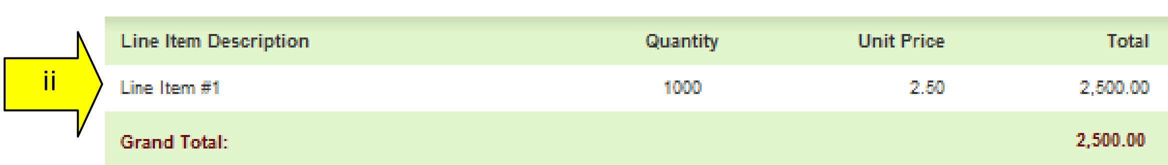
IV. Click on the "View" icon to review the details of a vendor's electronic response; the system will display two sub-tabs for each response submitted, "Core" and "Notes:"

a. 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;

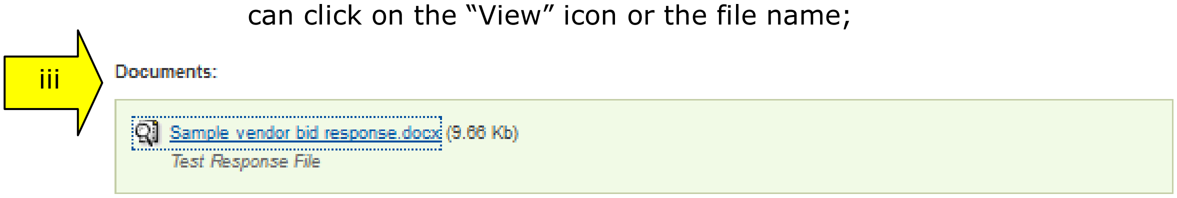


ii. The CLIN template, if applicable, as completed and submitted by the vendor with a Unit Price and Total price (Quantity multiplied by the Unit Price) per line item, as well as a Grand Total price for all line items;

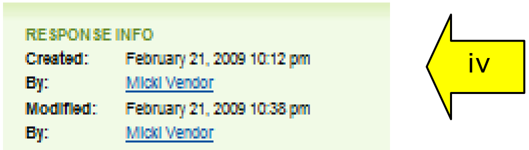


Line Item Description	Quantity	Unit Price	Total
Line Item #1	1000	2.50	2,500.00
Grand Total:			2,500.00

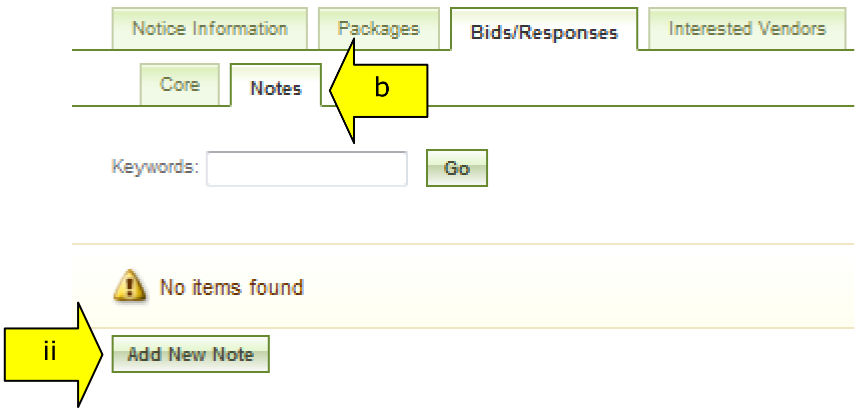
iii. A “Documents” section at the bottom where the user can view any file(s) submitted by the vendor as part of the response, including the file name, file size, and file description, if available; to open a file, the user can click on the “View” icon or the file name;



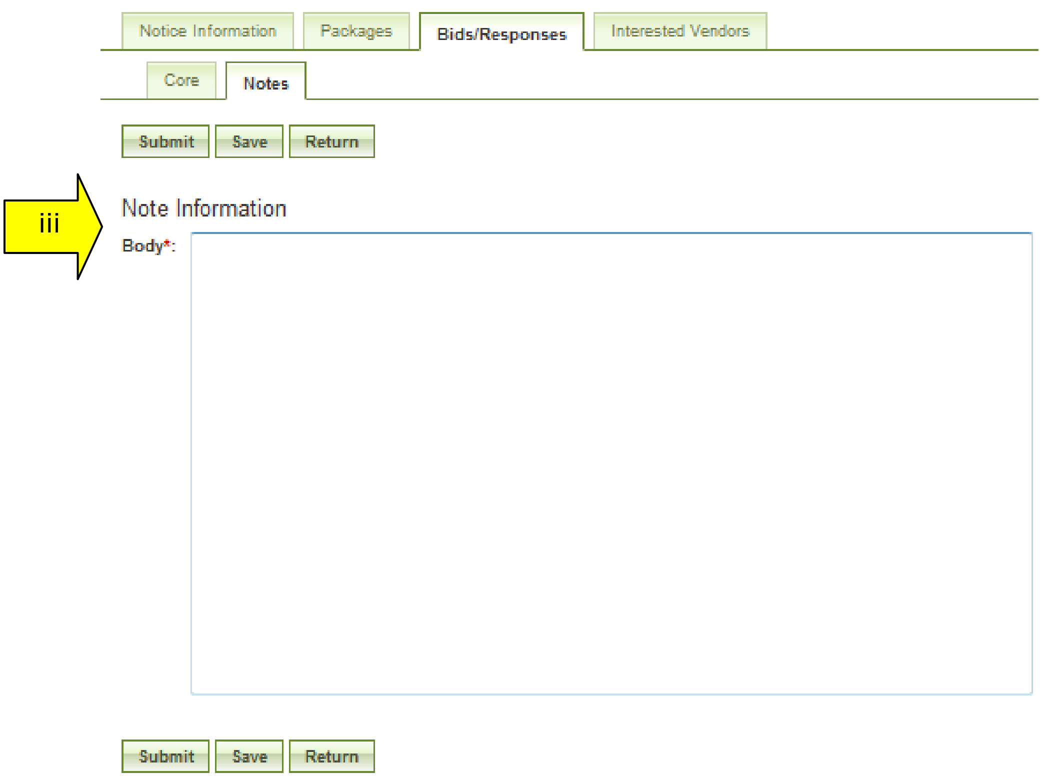
iv. A right side bar displaying the date the response was created, the date it was modified, and the vendor’s full name.



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;

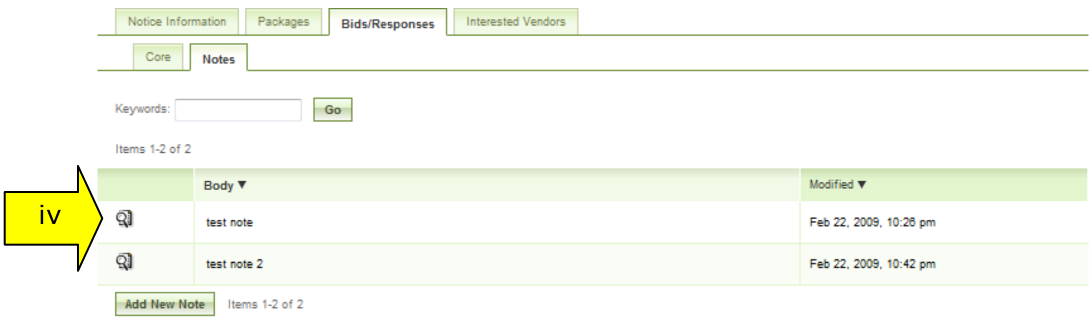


    iii. The system provides a text field where the user can enter in "Note Information;"

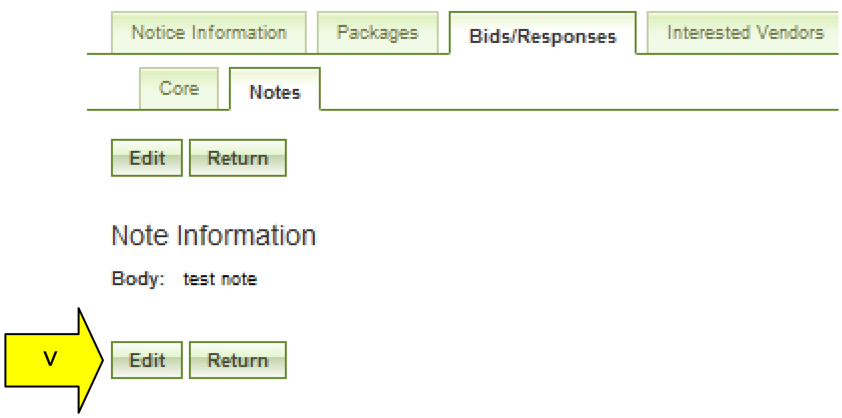


1. "Submit" saves the text entered and returns the user to the main "Notes" sub-tab listing all saved entries;
2. "Save" saves the text entered and keeps the user within that particular note for review;
3. "Return" does not save the text entered and returns the user to the main "Notes" sub-tab listing 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.

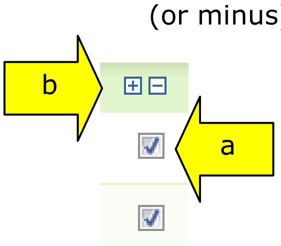


v. The user can review the "Note Information" and make changes (or delete the note) by clicking on the "Edit" button; otherwise, the user clicks "Return" to go back to the main list of "Notes" for that response.

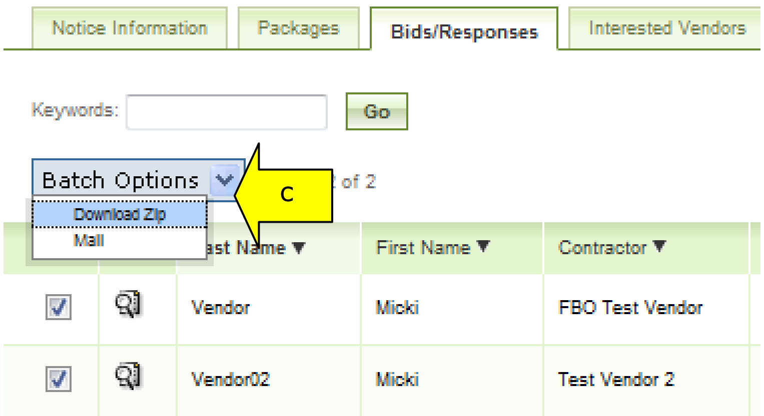


V. A user can download all or a select number of vendor responses into a Zip file by following these steps:

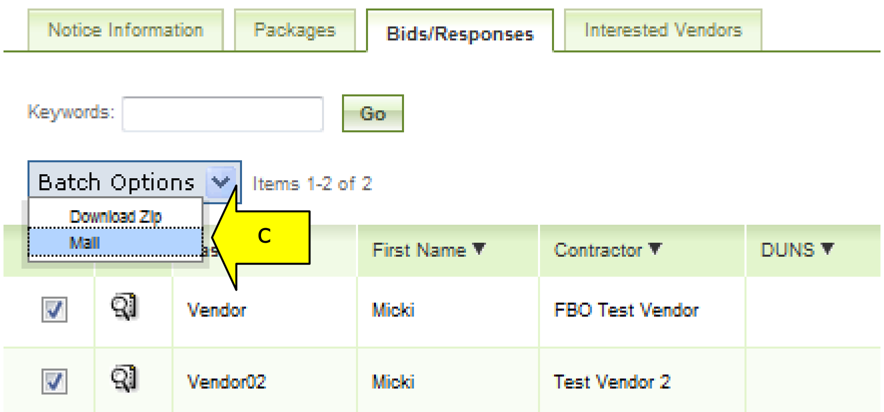
a. Within the "Bids/Responses" tab of a particular notice, select the responses to be downloaded using the checkboxes next to each response;
b. Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;



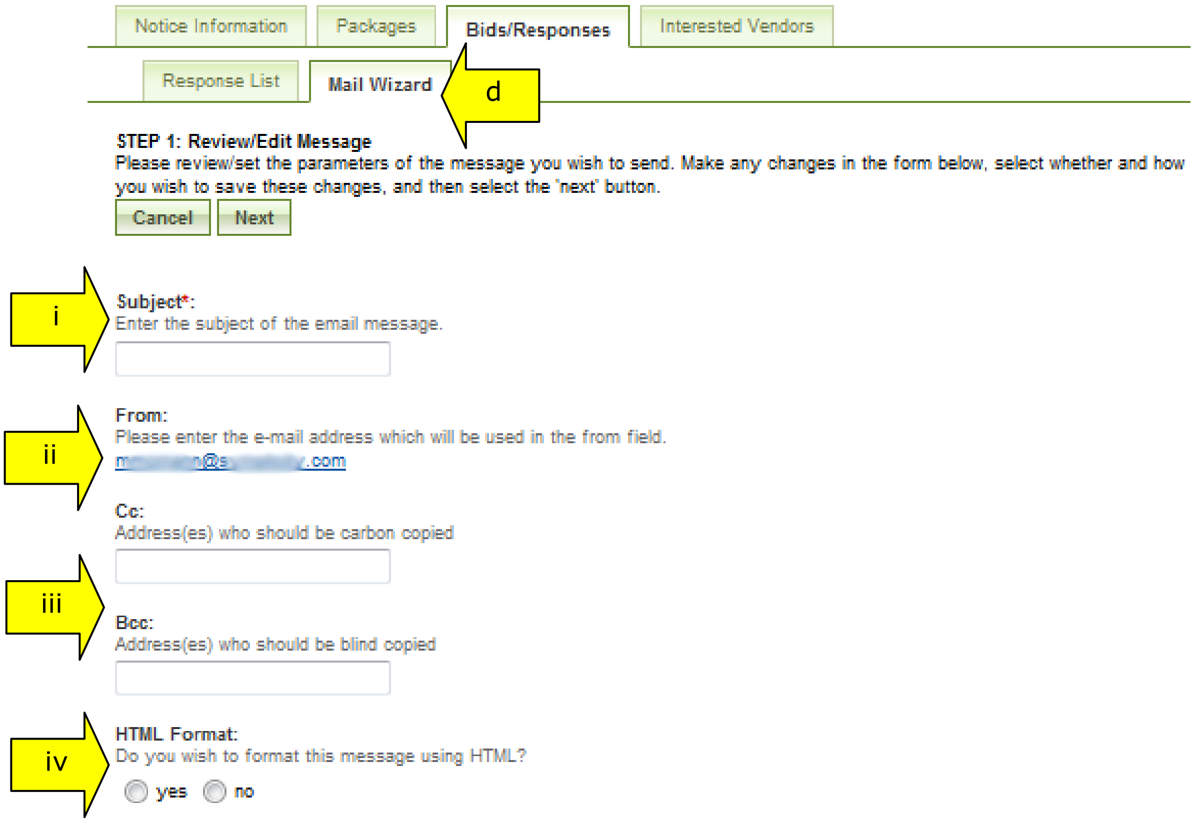
c. Next, click on the down arrow next to "Batch Options" and select the "Download Zip" option;



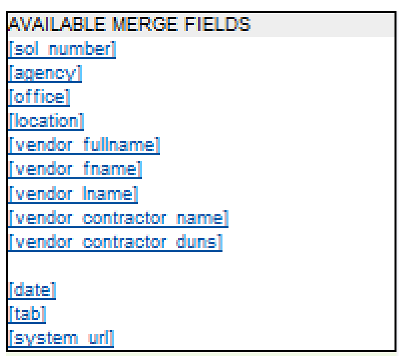
VI. Users can also send email messages to selected vendors by following these steps:
   a. Within the "Bids/Responses" tab of a particular notice, select the response(s) for which you would like to send an email message to the associated vendor(s) using the checkboxes next to each response;
   b. Note, 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 "Mail" option;



   d. The system opens "Mail Wizard" sub-tab which provides instructions for creating an email message to the vendors selected in the previous step:
      i. Enter the Subject of the email message;
      ii. The system will automatically enter in the email addresses on file for the vendor response(s) selected by the user;
      iii. 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;
      iv. Use the yes/no radio buttons to indicate if the message should be formatted using HTML;

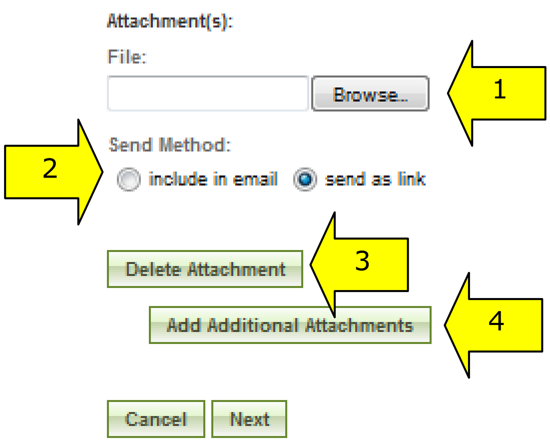


v. Enter the message body, including any "merge fields" which are identified in the right side bar; the user can either type the identifier (including the brackets) directly into the text body, or click on the blue text in the side bar to insert the information wherever needed.

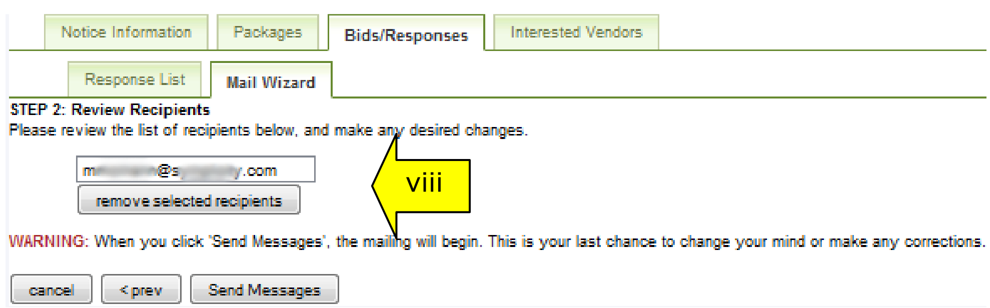


vi. The user is able to select one or more files from their computer to be included as part of the message.
   1. Click on the "Browse" button to select a file;
   2. Use the radio buttons to indicate the method for sending the file, either as an attachment in the email message, or as a link to the file;
   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

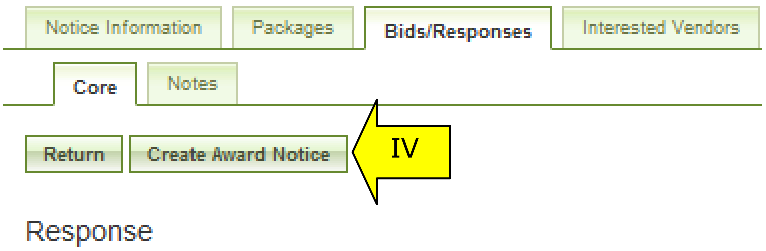


ix. “Cancel” does not save the message and returns the user to the main “Bids/Responses” tab;
x. “<prev” returns the user to step one, “Review/Edit Message;”
xi. “Send Messages” begins the mailing process. **Note, this action cannot be reversed.**

3.4.4 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 3.3.3 page 54 for screen shot).
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.)



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 3.3.3 for detailed information on the steps required to continue processing an award.

3.4.5 Cancel Notice

See section 3.3.4.

3.4.6 Deletion of Draft Notices

See section 3.3.5.

3.4.7 Archive Notices

See section 3.3.6.

3.4.8 Unarchive Notices

See section 3.3.7.

3.4.9 Print Notices

See section 3.3.8.

3.4.10 Review Interested Vendors List

See section 3.3.9.

3.5 Non-FBO Secure Document Link

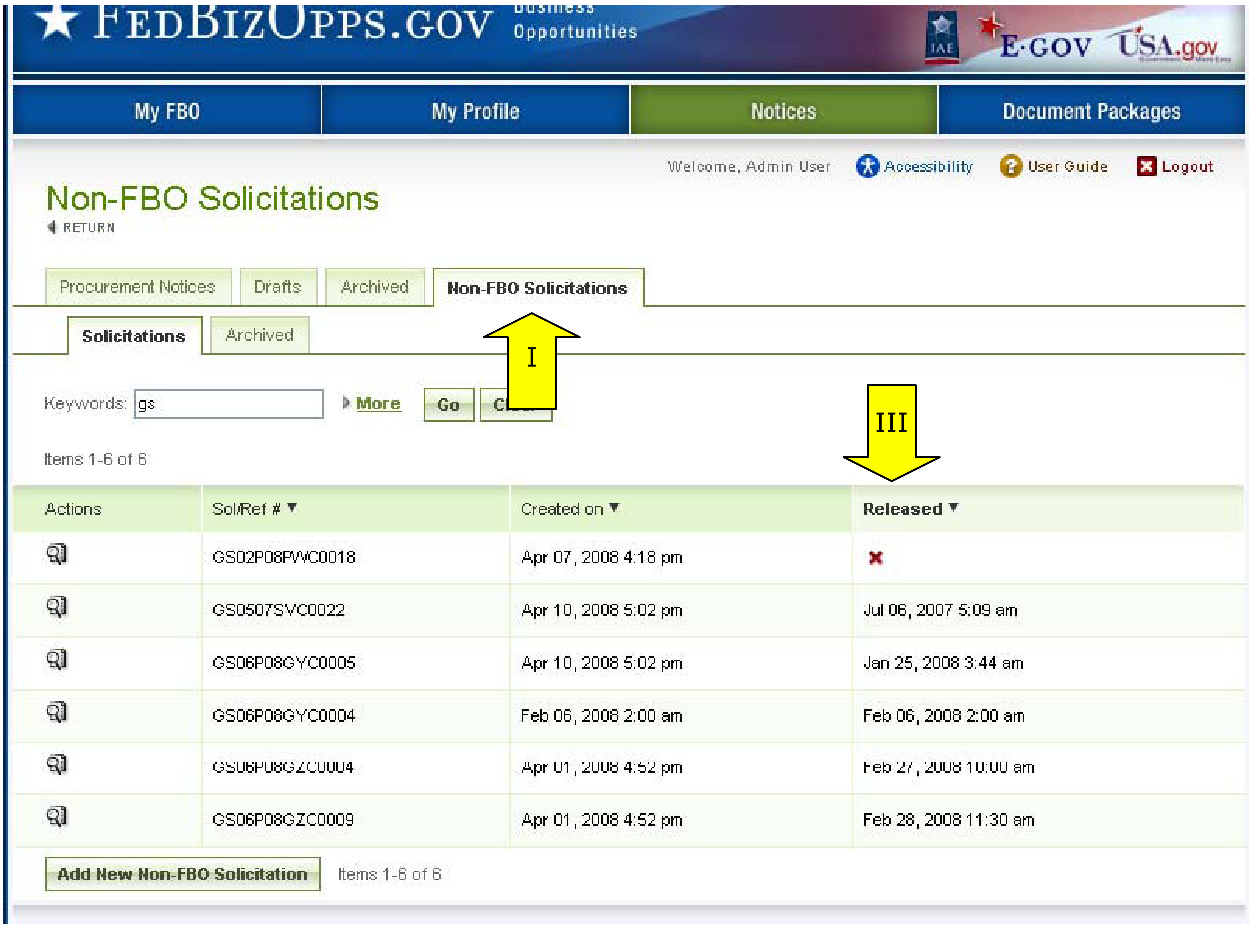
Users can create links to documents posted in FBO for viewing outside the context of FBO notices. These sorts of links were previously managed through FedTeDS.

3.5.1 Create Non-FBO Secure Document Link

I. From notices tab, 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.

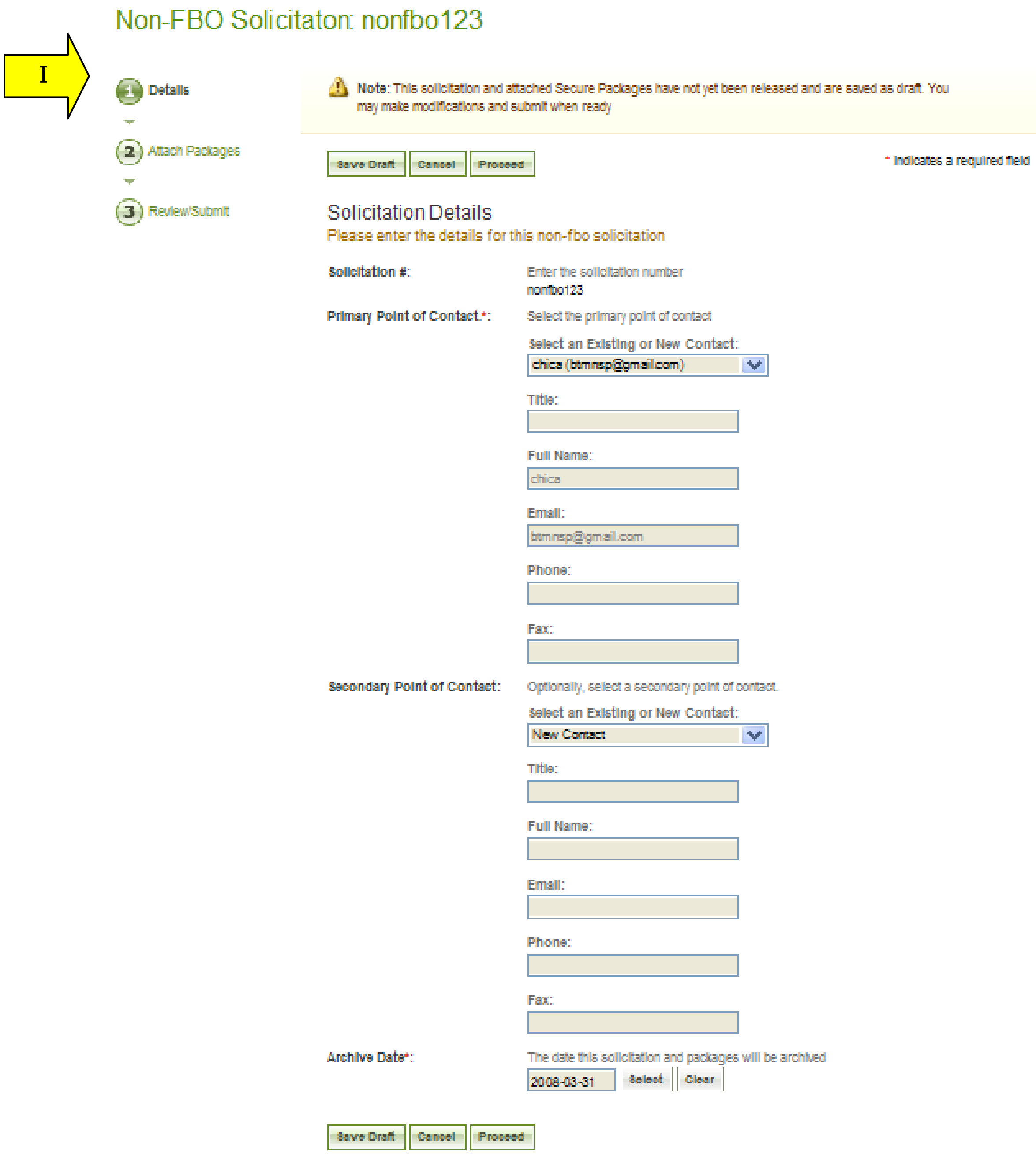


I. The first step of creating a Non-FBO Secure Document Link is essentially a simplified version of the notice form. This form only captures three key elements:
   i. the archive date
   ii. point of contact(s)
   iii. solicitation #.

II. Note, solicitation # and archive date 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.

IV. "Proceed" takes the user to the next step in the process.



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.
VI. Use the "save draft" button to save the Non-FBO Solicitation in draft format.
VII. "Cancel" returns the user to the list of Non-FBO Solicitations.
VIII. "Proceed & Review" takes the user to the final step in the process.

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. Users will be asked to confirm release.

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.

3.5.2 Un-release Non-FBO Secure Document Link

I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional. Vendors trying to view the link of an unreleased Non-FBO solicitation will receive the following error message:
NOTE: The Secure Documents link (formerly FedTeDS) you are trying to access cannot be found

II. Un-released Non-FBO solicitations are returned to "draft" status on the list of Non-FBO solicitations. On that list, in the released date, a red x will display.

III. To 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.

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

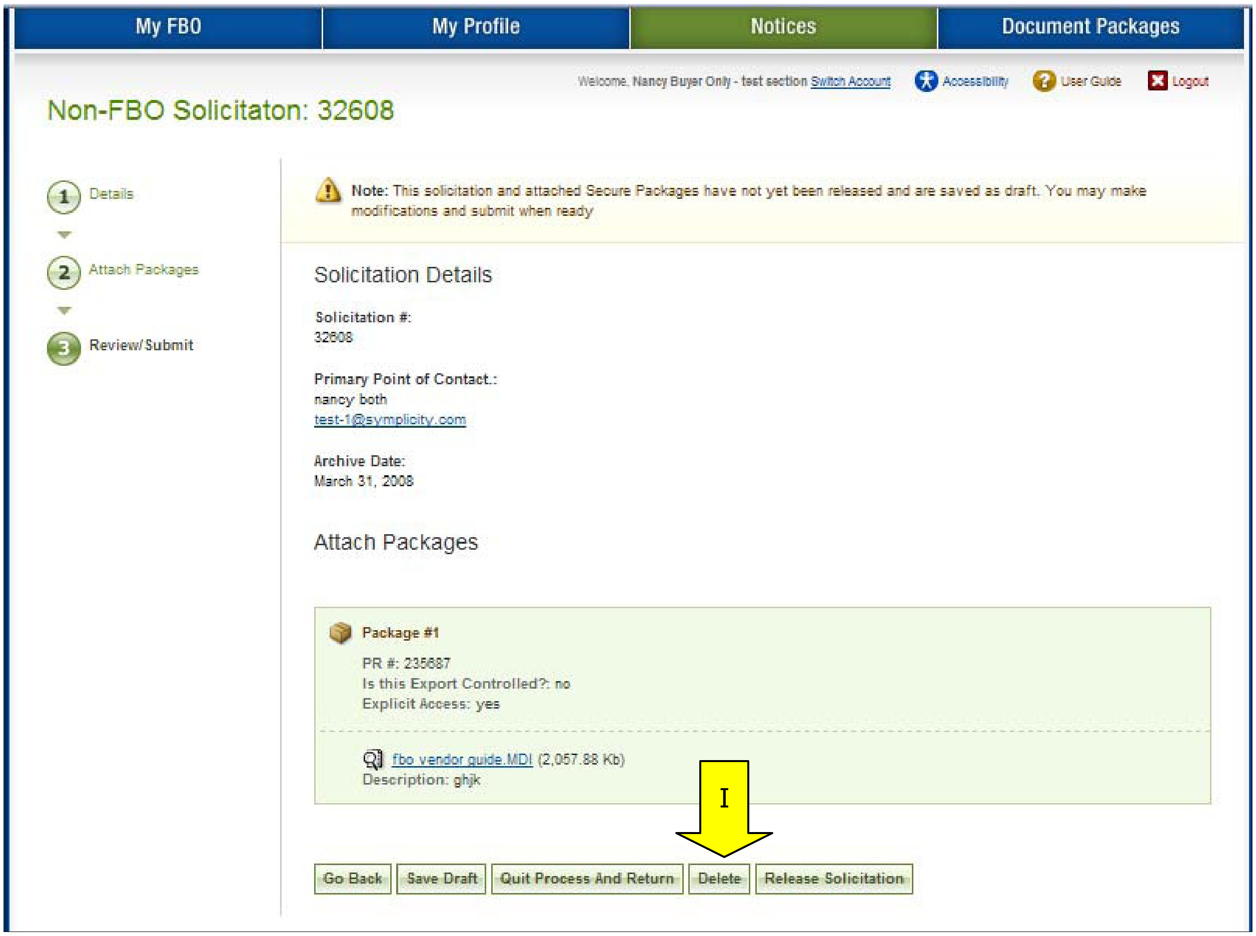
3.5.3 Delete Draft Non-FBO Secure Document Link

I. A user can review all drafts non-fbo solicitations from main "procurement notices" navigation and the sub-tab "non-fbo solicitations. Draft items are indicated with a red x in the released column.

II. To delete a draft item, the user can click on the review icon for the list item to open the draft notice.

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.



3.6 Manage Document Packages
(outside context of FBO Notice Creation)

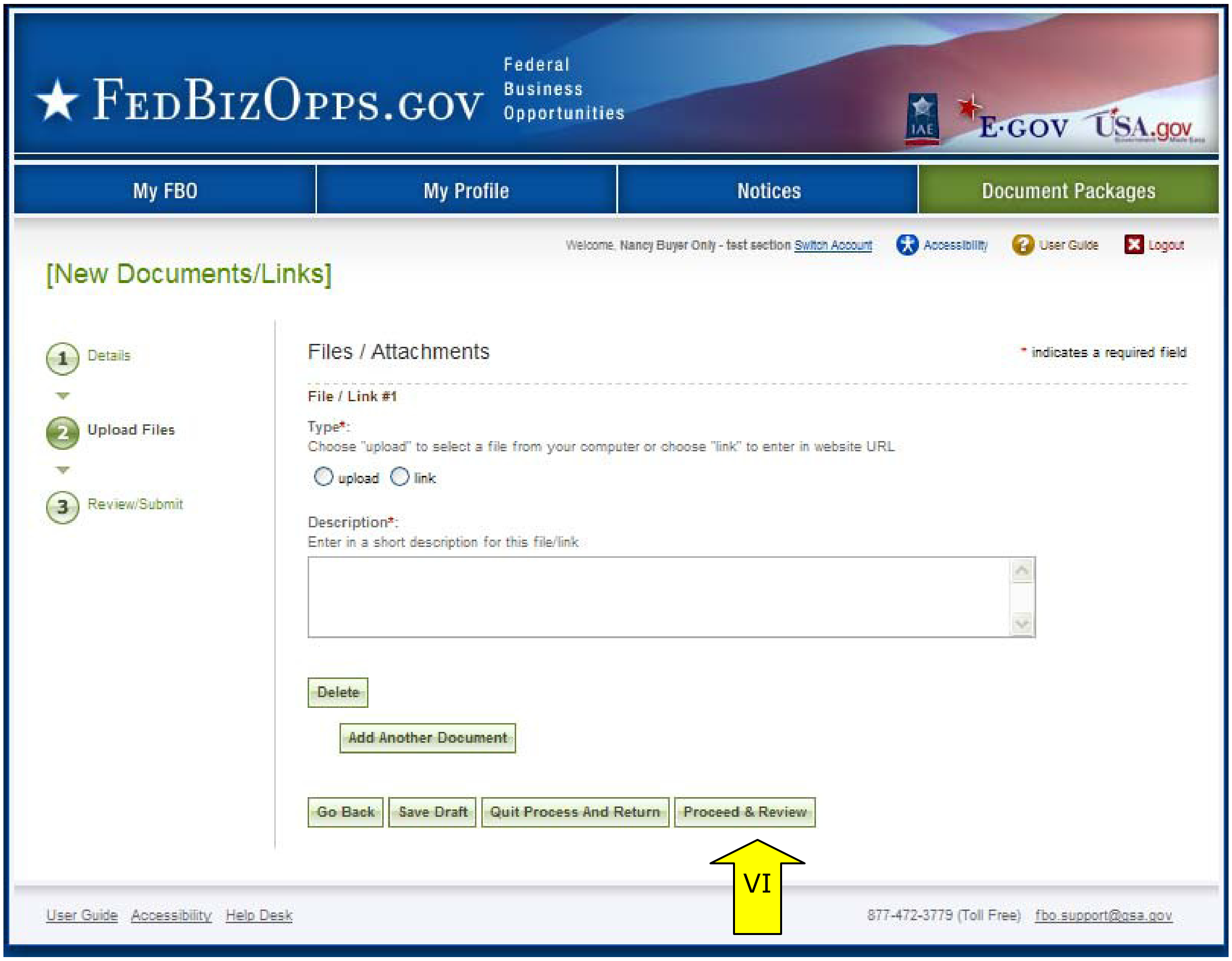
3.6.1 Add New Document Package to Existing Notice

I. From the "Document / Links" main navigation, users can create, and assign new documents to released solicitations.
II. Use the "add new" button.
III. Additionally, a user can use the quicklink "upload new docs/links" on their "My FBO" page to add a new package.
IV. Note, if you create a new document using this resource, and save the materials as drafts, the resources will remain as drafts in the system until they are posted or deleted.
V. Buyers that are buyer only – versus both "buyer and engineer" will only be able to create non-secured packages through this process.

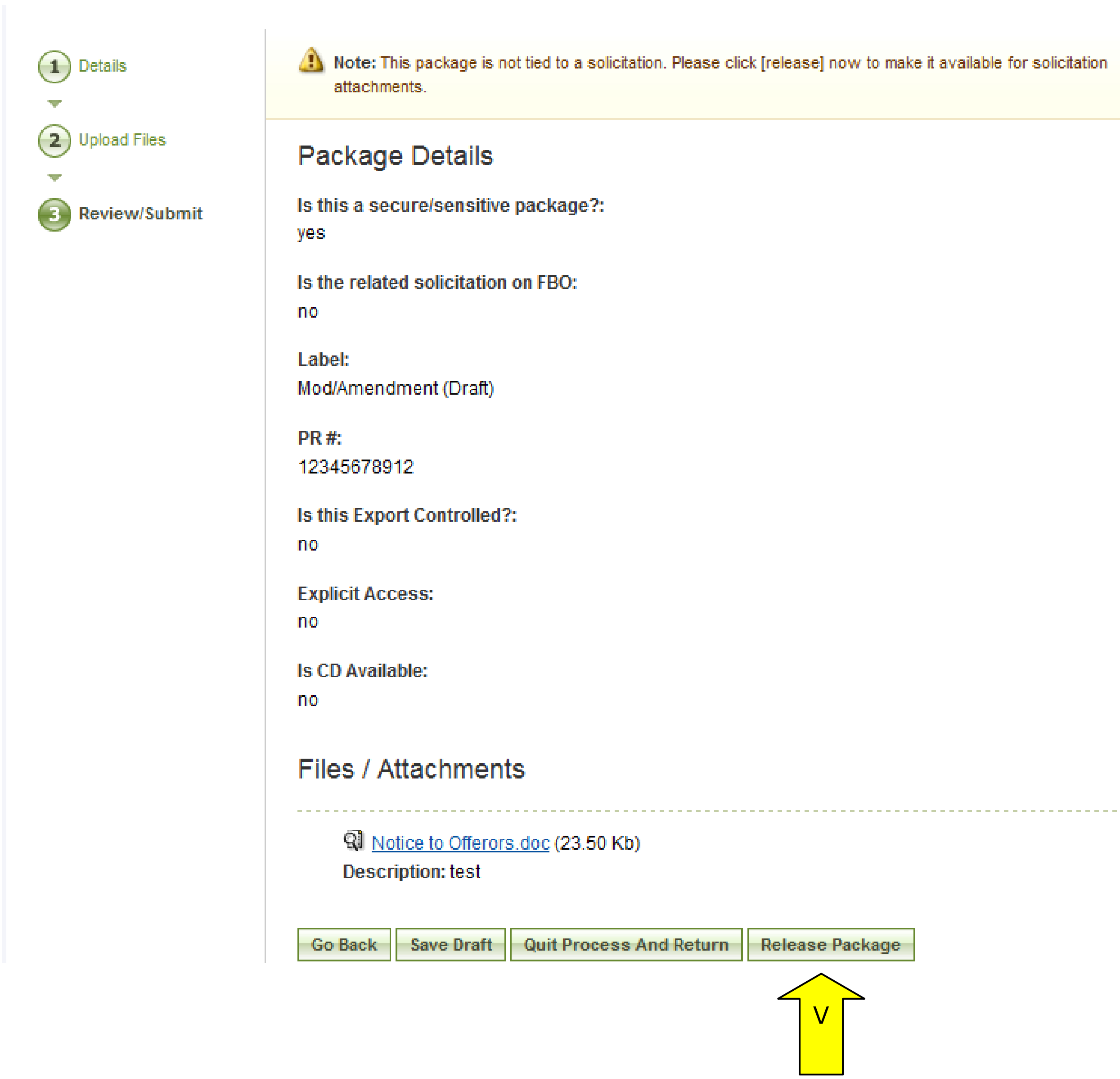
I. At step one, Details, the user indicates whether the document is sensitive/secure and if tied to a FBO solicitation, and then completes the other elements of the document package creation process (fields will appear conditionally based on user responses).

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.

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.

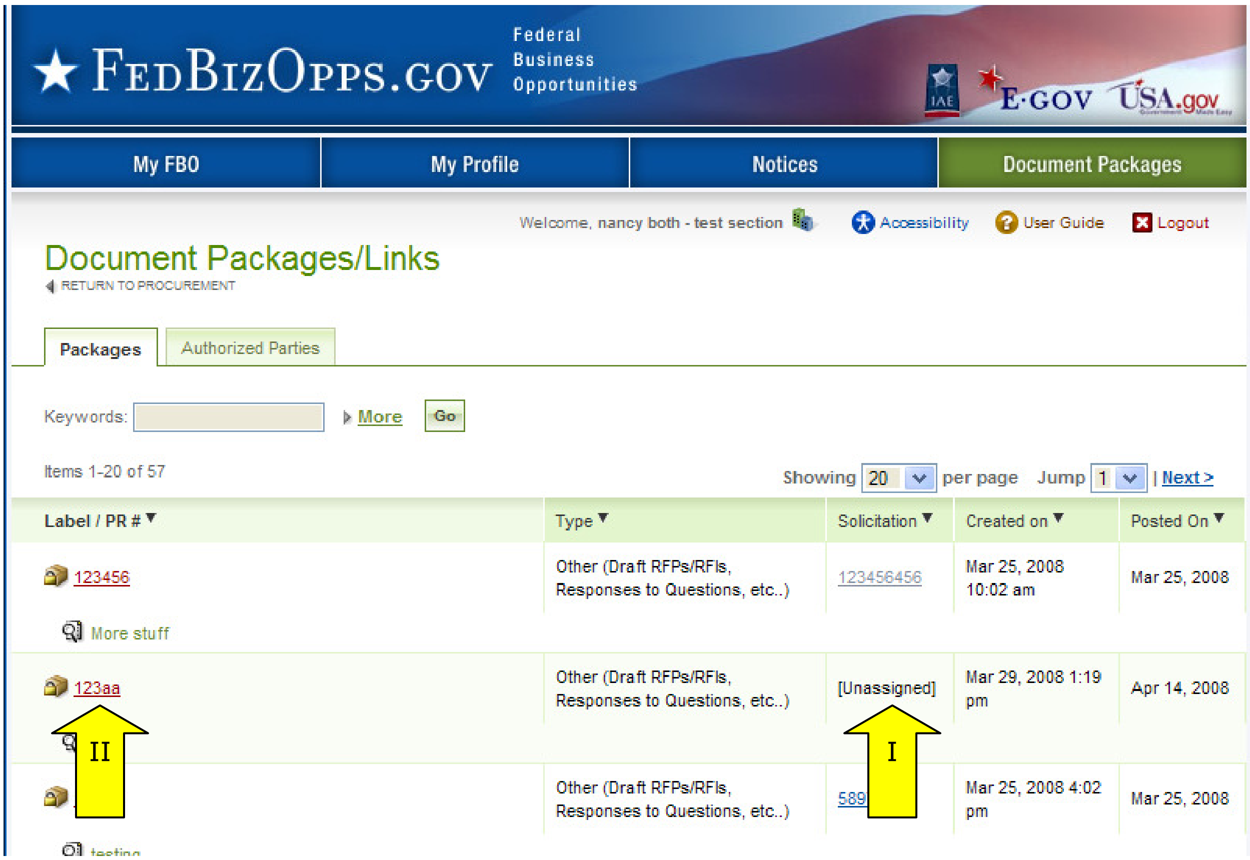


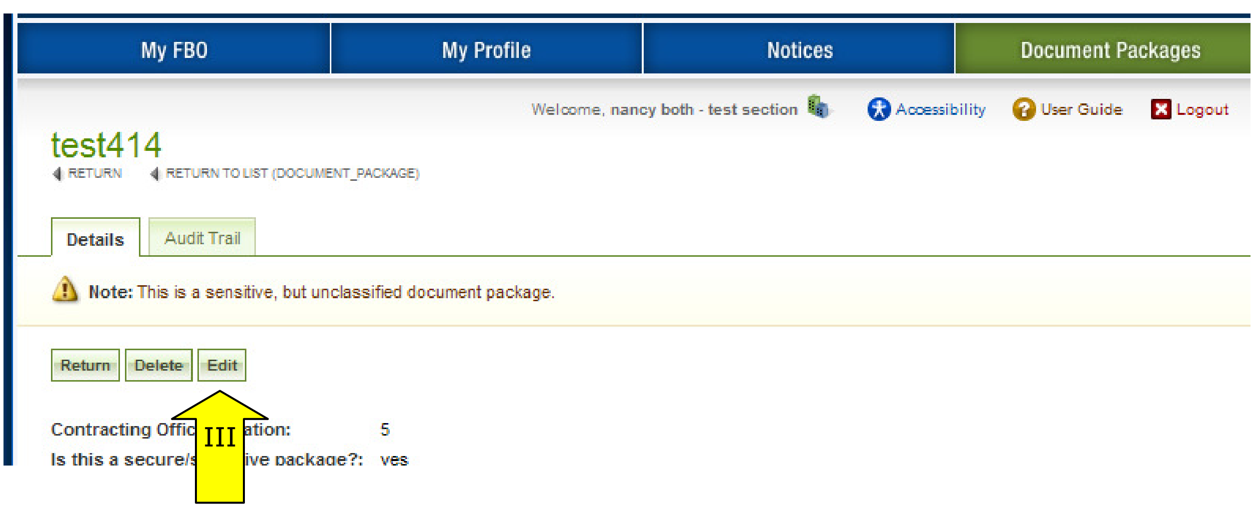
I. At step three, "review/submit," the user is able to review materials, and if appropriate to use "post documents."
II. ""Go back" allows the user to go back in the stepwise process.
III. "Save Draft" saves the materials to the draft notice.
IV. "Cancel" returns the user to the previous navigation.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



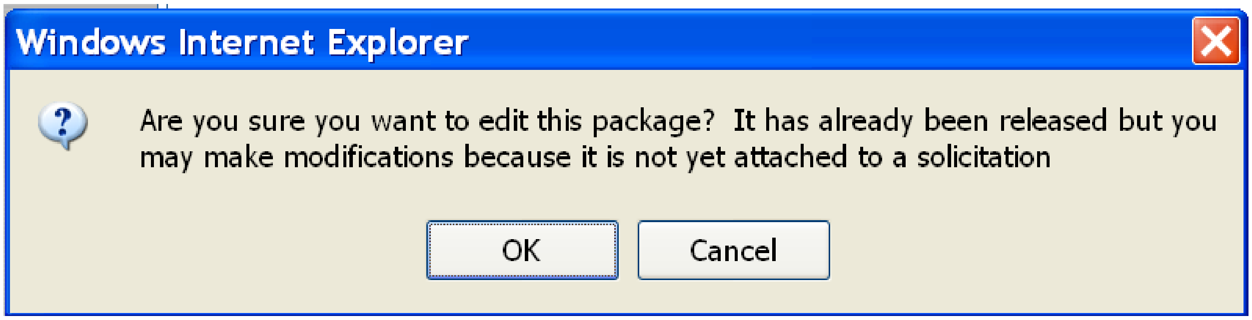
3.6.2 Edit Document Package

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





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.



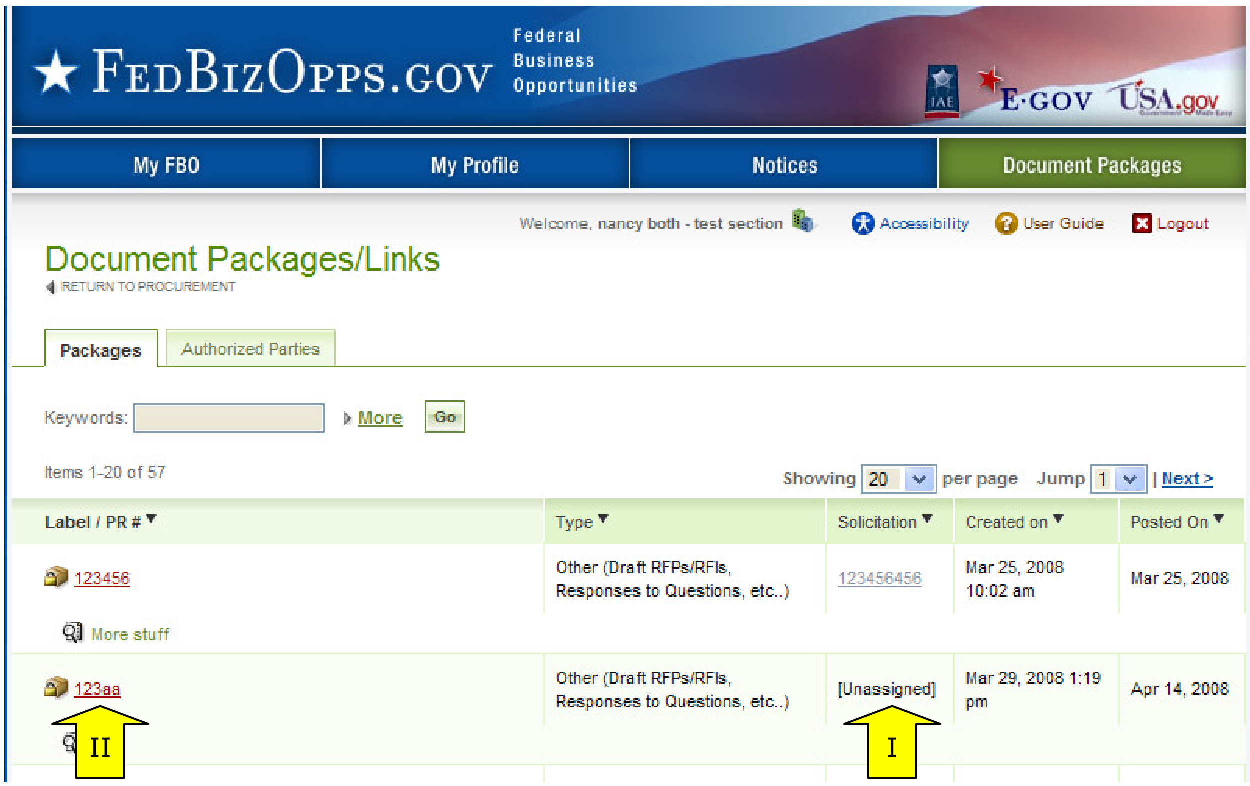
II. Users will be taken to step one of document creation and can progress as if the document had been previously saved as draft. See above for details on notice creation.

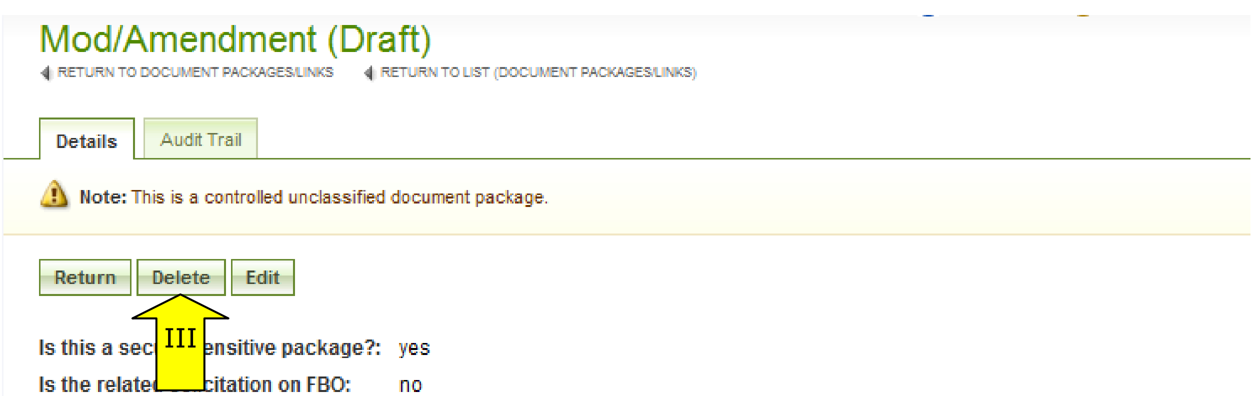
3.6.3 Delete Document Package

I. Note, if a package has been posted to a solicitation, the user will not be able to delete the package. Only packages that list "unassigned" in the solicitation column will have "delete" as an option when opened.

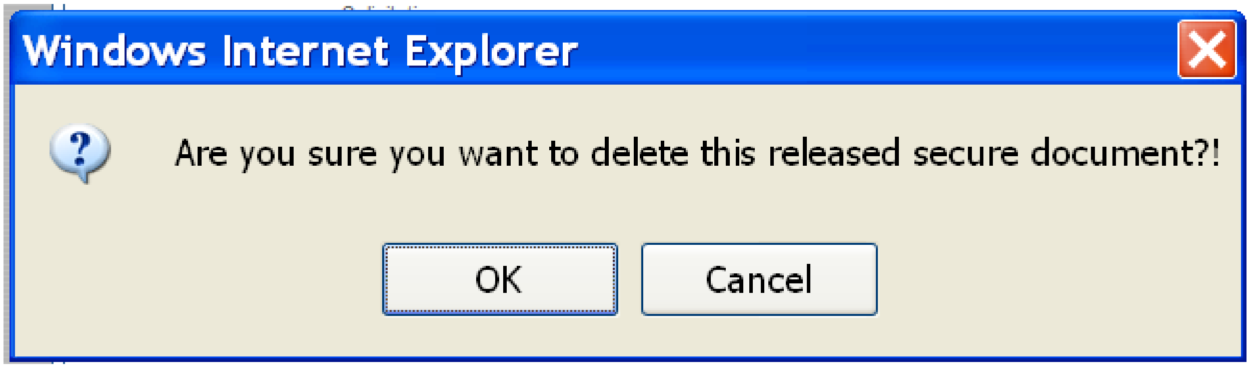
II. To delete a document package, go to main navigation “document packages”, and select the package link for the package to be deleted. This opens the “details” of the package.

III. When "details" are open, select the "delete" button.





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



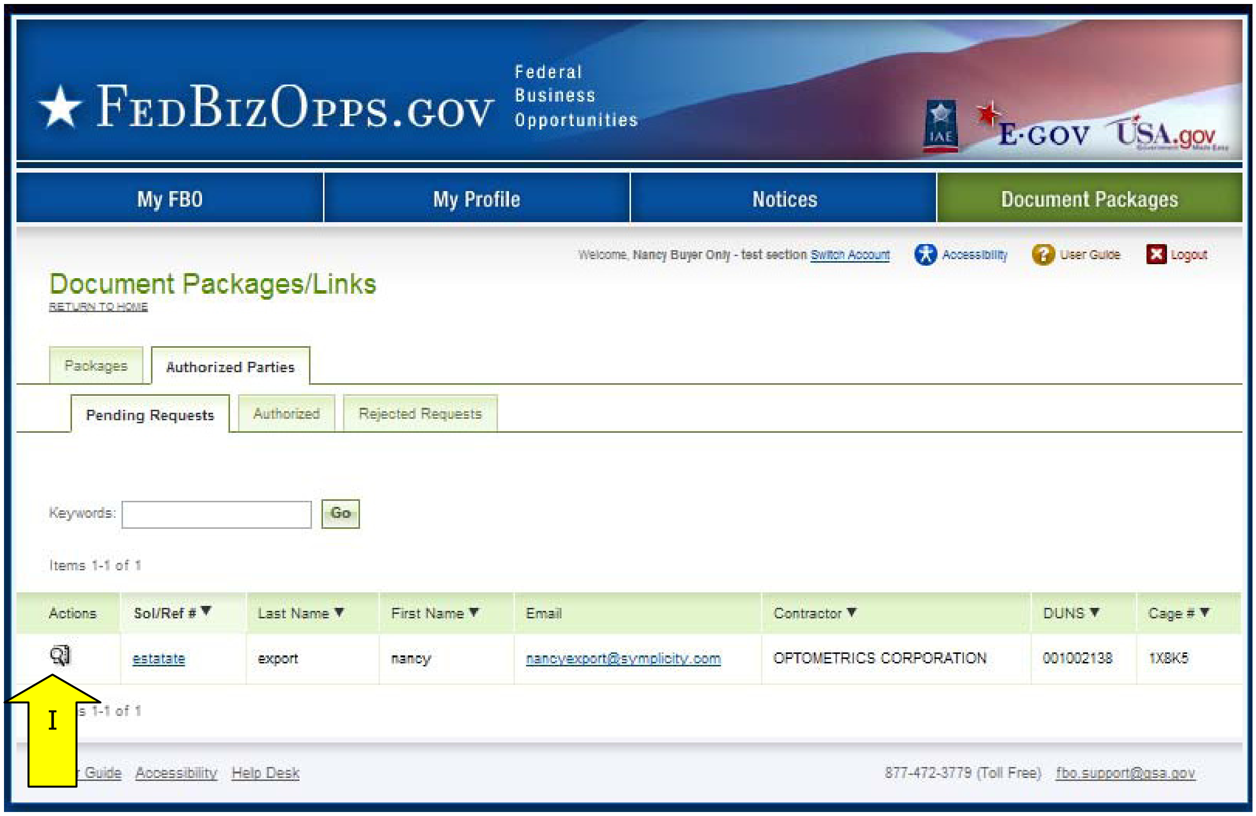
3.6.4 Manage Explicit Access Requests

I. A user can see if they have any pending Explicit Access Requests on their home page in the Pending Actions display. Note this tally is specific to the account.

II. Click on the presented link to navigate to the list of pending requests.

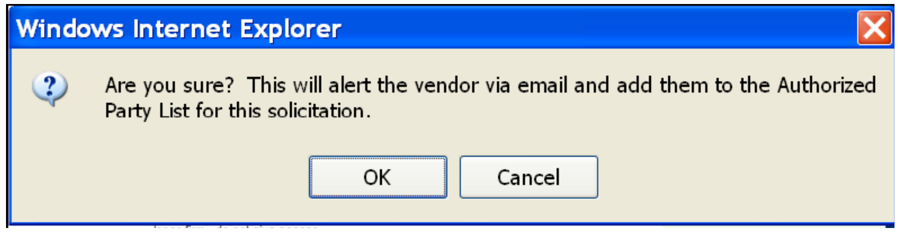
III. Alternatively, a user can navigate to the "authorized parties" list from the "Document Packages" main navigation, and selecting the "authorized Parties" sub-tab.

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.



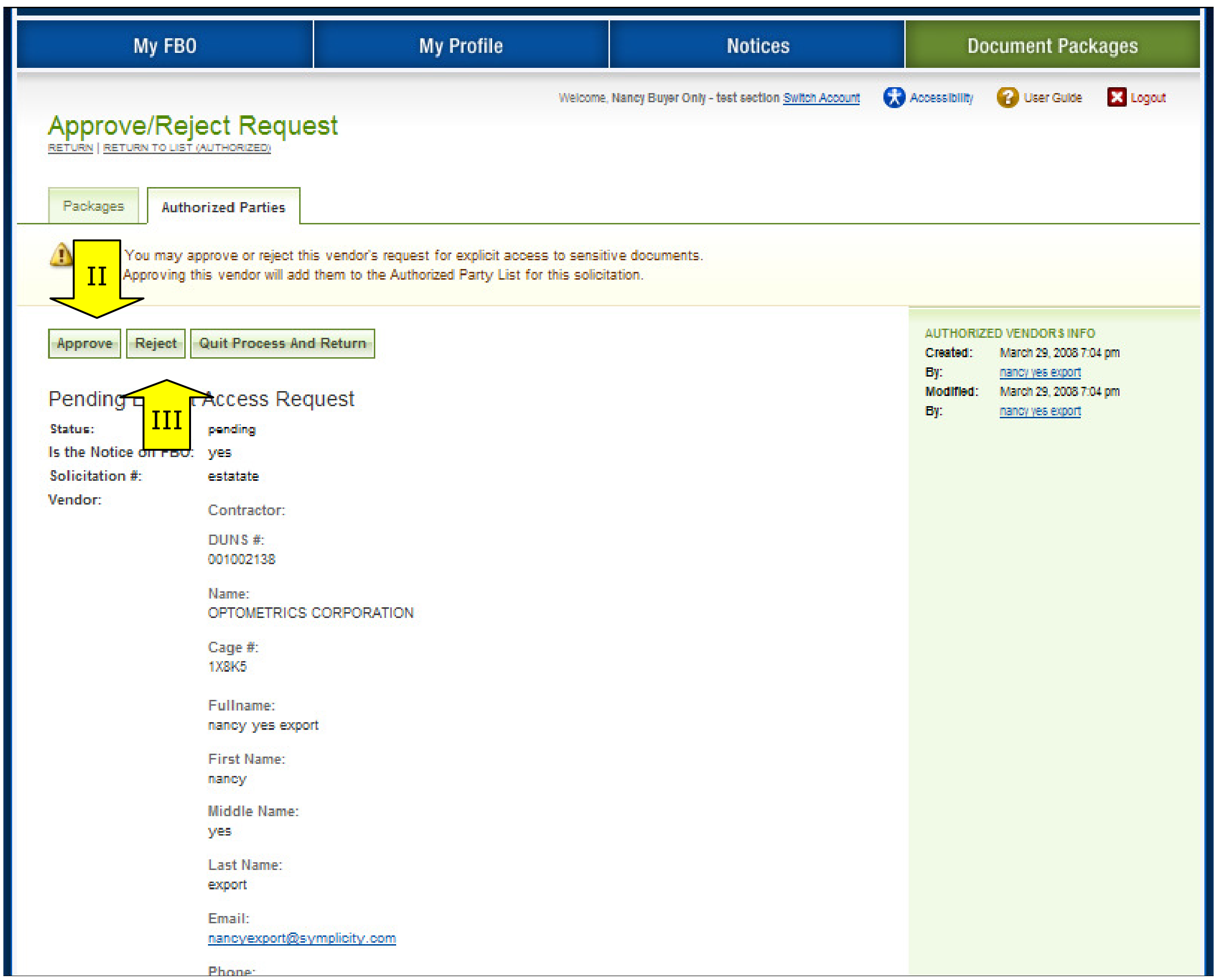
I. When the review icon is clicked, the pending explicit access request record is opened.

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.

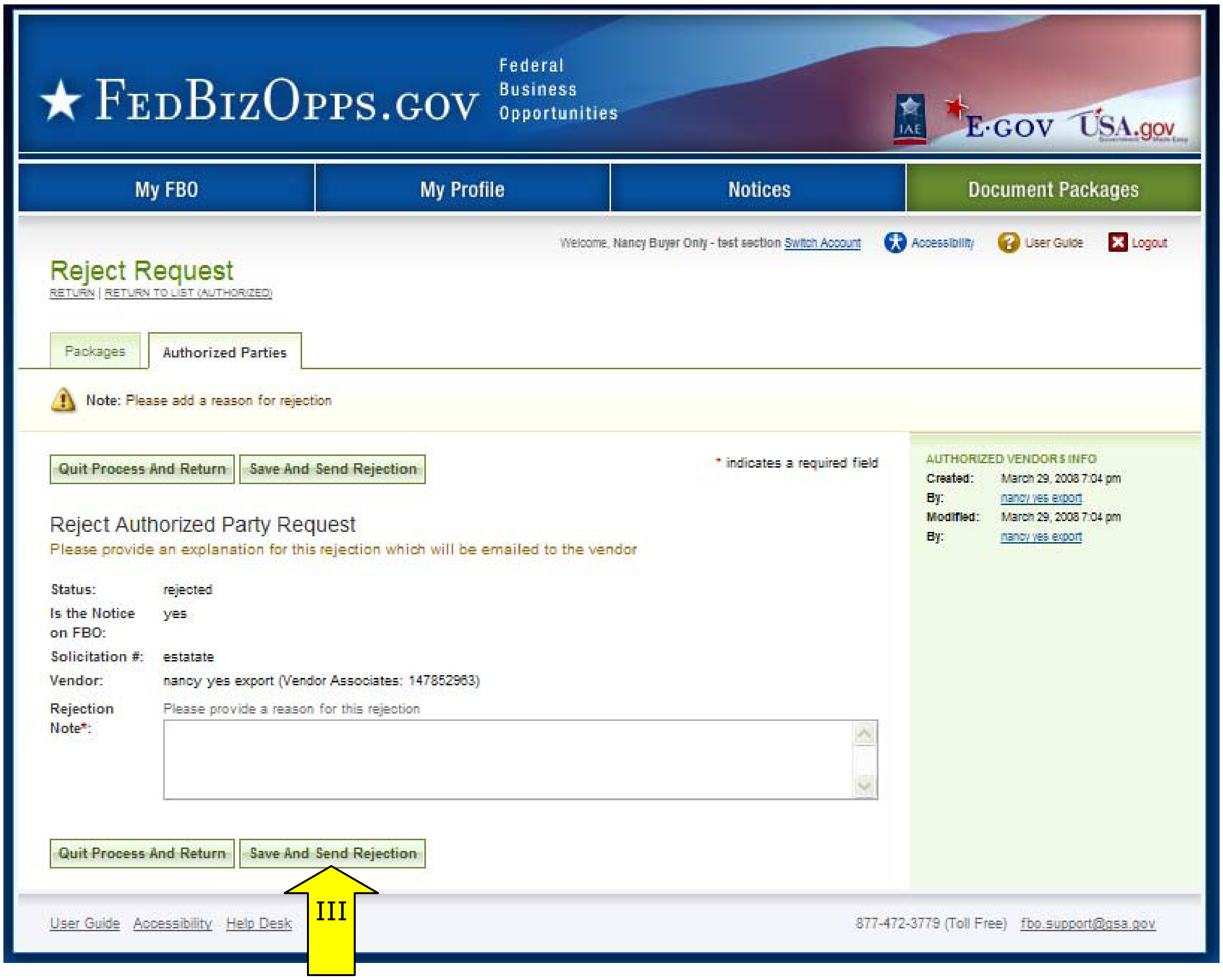


III. To "reject" the request, select "reject" (see below for details on rejection).

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.

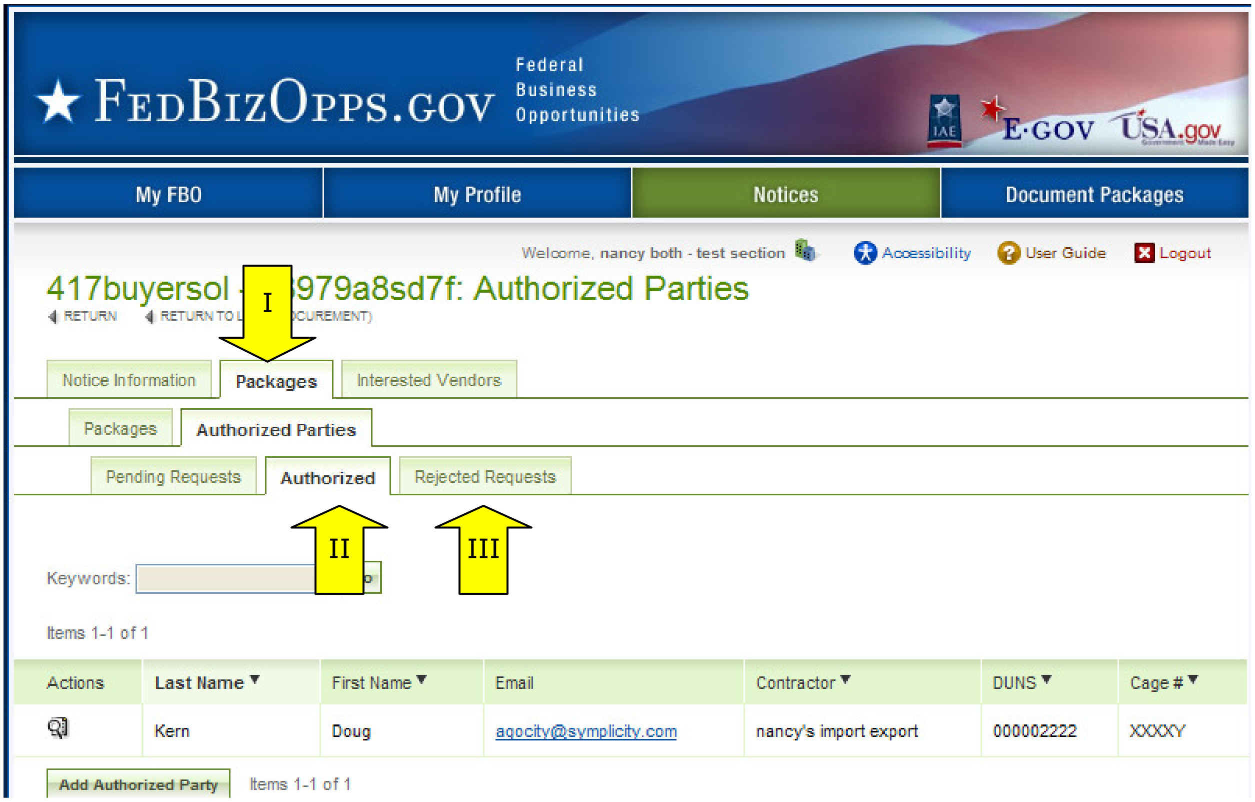


3.6.5 Review Authorized / Rejected Explicit Access Requests

I. To review the previously authorized / rejected explicit access requests, go 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.

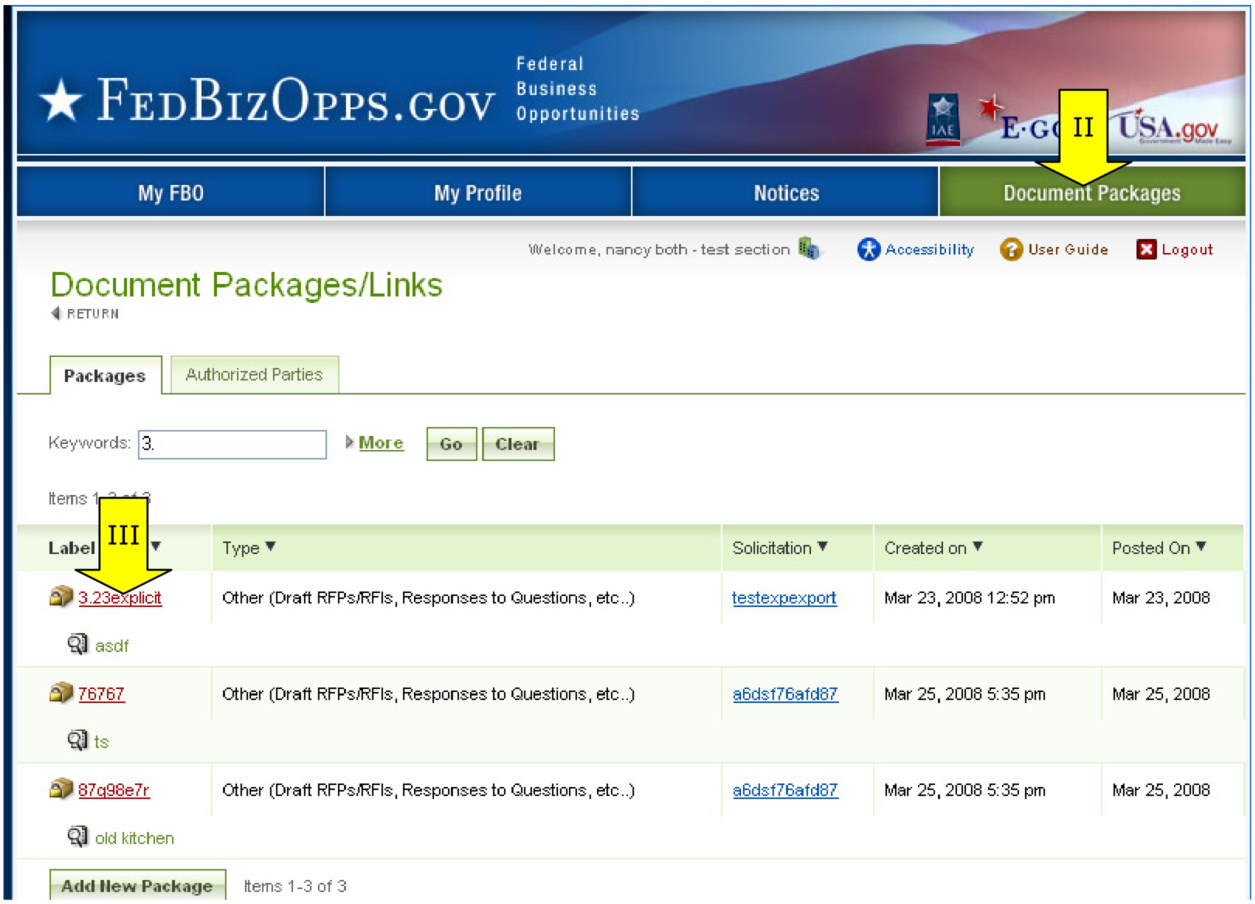


3.6.6 Document Audit Trail

I. For controlled, 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 Packages."

III. For the document package you would like to review, click on the package link (not the actual document file link(s).



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 document reviews.

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.

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

II. "Return" closes the record.