

FBO.GOV Location Admin 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
- General Information
- Opportunities
- Agencies / Offices Lists
- Privacy Statement

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

- **Buyers:** Possess key system functionality as outlined below:
 - Maintain Buyer Profile. Buyers can be set up to be agency, or specific contracting office, buyers.
 - Create, Modify/Amend, or Cancel an Opportunity Notice.
 - Manage document package content, and vendor accessibility to package documents, that support opportunities. Buyers can upload non-sensitive docs (and attach existing controlled, unclassified docs 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 identifier, 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 Numbering System) Number**
 - **Commercial and Government Entity (CAGE) Code**
 - **MPIN (Marketing Partner Identification Number)** – Optional profile field required to view controlled, unclassified materials.


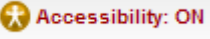

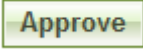
- Vendor Opportunity Review Features: Vendor can search for opportunities based on the following terms:
 - Keyword or Solicitation Number
 - Opportunity/Procurement Type
 - Posted Date
 - Response Deadline
 - Last Modified Date
 - Contract Award Date
 - Place of Performance Zip Code
 - Place of Performance 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


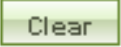



Vendor can set up “search agents” based on detailed search elements, which highlight newly added opportunities which align with their search criteria. Vendor can add opportunities to a “watched list” list (akin to a “favorites” list). Per the vendor’s profile status, vendor can review documents associated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


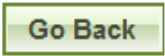






- Opportunity Actions: Vendors are able to add themselves to the “Interested Vendors List” (IVL) for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors can request explicit access to view controlled, unclassified materials 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 to those packages. 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.



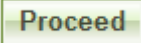
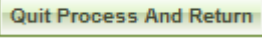

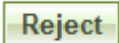




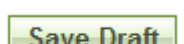
1.1 Definition of key terms



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.
Add Office Location		Allows admin to insert office location for Agency.
Active Notice	n/a	Notice that is open for vendor review/response.
Approve		The “Approve” button is used to approve a vendor’s request for explicit access to 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 requires that the vendor's company be certified by the Defense Logistics Information Service Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application. Those vendors that are certified to receive export controlled materials are termed “authorized vendors.” This system receives a daily feed of authorized vendors, which determines access based on a vendor’s CAGE code/MPIN.
Bids	n/a	If enabled by the admin and buyer, this feature allows for the electronic submission and evaluation of vendor responses to notices.
Buyer	n/a	Government user that is presenting an opportunity notice in the system.
CAGE Code	n/a	Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies

		companies doing, or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second, third and fourth may be any mixture of alpha/numeric excluding I and O. All positions are non-significant. The code provides for a standardized method of identifying a given facility at a specific location.
Cancel Notice		Notice that has been cancelled. Does not go to archives until archive date for the notice.
Clear		The "Clear" button appears when a 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"
Document	n/a	"Document" is a single attachment (either link or uploaded document) that can be attached to a "Notice". A collection of documents can be bundled to create a "Package"
Doc Package	n/a	If enabled by the buyer, vendors can submit an electronic response to notices in the form of document (file) uploads.
Draft		Saved, but not necessarily complete. Drafts are not viewable on vendor interface.
DUNS	n/a	DUNS (Data Universal Number System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central 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 Admin and Buyer, vendors can submit electronic responses to notices called Electronic Submissions which can be a CLIN form and/or a doc package.
Engineer	n/a	User that can post / update sensitive, but unclassified documents for use as attachments to Opportunities. Engineers are registered for a

		particular agency/office and usually location. Buyers of the same office will see unattached technical packages when posting notices for attachment.
Explicit Access	n/a	Vendor is given explicit access to review controlled, unclassified package(s). A government user can proactively 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 (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.
Insert Child Agency		Allows admin to insert sub-agency in an Agency hierarchy.
Interested Vendor	n/a	If a notice is set to allow for either of these features (note the features are set by the buyer), vendors will be allowed to do the following: 1) indicate interest in a particular notice, 2) review the listing of interested vendors for a notice (i.e., list of targets for potential collaboration).
Log-in		Use username and password to logon to an account on the system
Logout		The "Logout" button can be used to log the user off the system.
Modify/Amend		Edit or amend a notice.
MPIN	n/a	Marketing Partner Identification Number. Export Controlled requires that the vendor's company be certified by the Defense Logistics Information Service Joint Certification Program to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's DUNS/MPIN.

Non-FBO Solicitation	n/a	Buyers can create links to 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 Text		
Post		Finalizes a Notice and posts the notice on the system for vendor review.
Proceed		The "Proceed" button saves the entered data on a form and takes the user to the next step (first prompting users to complete required fields on the form).
Quicklink	n/a	A "quicklink" is a system navigational option that if selected takes a user to a specific action on the site.
Quit Process and Return		The "quit process and return" button returns the user to the previous page, without updating any record fields.
Register		Request a user account on the system.
Reject		The "Reject" button is used to reject a vendor's request for explicit access to controlled, unclassified documents.
Release Package		Finalizes a Package and releases for use by a buyer.
Required Field	*	A red asterisk next to a field label indicates that the field is a required.
Return		The "return" button returns the user to the navigation.
Review or view		"Review" opens an object for review.
Save		The "Save" button saves the entered data on the form. User will be required to complete all required fields on the form.
Save Draft		The "Save Draft" button saves the entered data in a draft document, (user is not required to complete required fields on the form).
Search Agent	n/a	Vendors can set up "search agents" based on selected detailed search elements. Search agents can be run on an ad hoc or scheduled basis to highlight newly filed opportunities which align with

		the designated search criteria.
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).
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 link.

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 office locations)
- IV. Agencies
- V. Privacy

The screenshot shows the top navigation bar of the FEDBIZOPPS.GOV website. The navigation bar includes links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. The search area features a search bar with filters for Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), and Type (Any). A sidebar on the right contains sections for RECOVERY, FBO RECOVERY REPORTS, and USER GUIDES.

Navigation Bar:

- Home
- Getting Started
- General Info
- Opportunities
- Agencies
- Privacy

Search Area:

Search more than **200*** active federal opportunities.

Posted Date: Last 90 Days | Set-Aside Code: Any

Place of Performance: Any State or Territory | Type: Any

Keyword / Solicitation #:

Agency:

Additional criteria and multiple selections are available on the [advanced search form](#).
* Notices posted within the last 90 days.

RECOVERY
FBO now contains Recovery and Reinvestment Act actions.

FBO RECOVERY REPORTS

- Click [here for Opportunities](#)
- Click [here for Awards](#)

Click [here](#) to learn more.

USER GUIDES

- [Buyer](#)
- [Vendor](#)
- [Engineer](#)
- [Location / Agency Admin](#)

Use [Adobe Acrobat Reader](#) to view files in PDF format.

Buyers / Engineers
Government users may post, manage, and award opportunities.

Vendors / Citizens
Vendors and citizens may search, monitor, and retrieve opportunities.

2.3 Register for an Account

Note - Before an individual government user can register to use FBO, his or her Agency must be registered with FBO. Please contact the [Federal Service Desk \(www.fsd.gov\)](http://www.fsd.gov) for assistance with Agency Registration.

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

The screenshot shows the FBO website registration page. It is divided into four main sections:

- Buyers / Engineers:** Government users may post, manage, and award opportunities. Includes fields for Username and Password, a Login button, and links for View Opportunities, Register Now, Password Reminder, and Recovery FAQs.
- Vendors / Citizens:** Vendors and citizens may search, monitor, and retrieve opportunities. Includes fields for Username and Password, a Login button, and links for Find Opportunities, Register Now, Password Reminder, and Recovery FAQs.
- Location / Agency Administrators:** Includes links for Login Here and Register Now. A yellow arrow with the letter 'I' points to the Register Now link.
- ADDITIONAL RESOURCES:** A list of links including FAQs, Federal Service Desk, Recovery.gov, Whitehouse.gov/recovery/, Business Partner Network (BPN), Central Contractor Registration (CCR), Online Reqs & Cert Application (ORCA), Federal Agency Business Forecasts, Federal Assets Sales, Federal Grants, USA.gov, Minority Business Development Agency, SUB - Net (Subcontracting Opportunities), and IAE.

On the right side, there are links for Engineer and Location / Agency Admin, a note about using Adobe Acrobat Reader, and a section for DEMONSTRATION VIDEOS with a Watch the Videos link.

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

The screenshot shows the 'FedBizOpps (FBO) Registration Form for Federal Users'. At the top, there is a navigation bar with links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. Below this is the title 'Location/Agency Administrator Registration' and an accessibility icon. A sidebar on the left lists three steps: 1. Personal Information, 2. Account Information, and 3. Review/Submit. The main content area contains the following fields and instructions:

- Your Full Name*:** Please enter your full name. Example: John F. Smith. (Text input field)
- Your Suffix:** If applicable, enter your suffix. (Text input field)
- The Title of Your Position:** Enter the title of the position you hold at your agency. (Text input field)
- Your Email Address*:** Enter your email address. Example: john@agency.gov. (Text input field)
- Phone*:** Enter your phone number. (Text input field)

At the bottom of the form, there are two buttons: 'Cancel' and 'Proceed'. A yellow arrow labeled 'II' points to the 'Proceed' button.

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

Location/Agency Administrator Registration

[RETURN TO HOME](#)

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

User Level*:

Agency Administrator 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

- 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.

2 Account Information



3 Review/Submit

FedBizOpps (FBO) Registration Form for Federal Users

Your Full Name:

TEST LA

Your Email Address:

testla@noemail.com

Phone:

5555551212

Account Information

Agency:

GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment

User Level:

Office Location Administrator

Contracting Office Location:

Symplicity Test Location

Username:

TESTLA

Desired Password:

Repeat Desired Password:



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



The screenshot shows the FEDBIZOPPS.GOV website. The header includes the logo and navigation menu. The main content area is titled "Buyer Registration" and shows a progress bar with three steps: 1. Personal Information, 2. Account Information, and 3. Review/Submit. The current step is "Final Step: Email Verification". A yellow envelope icon with a checkmark is shown next to the text: "IMPORTANT: You should receive an email shortly. In order to complete the registration process, you **must** verify your email address and identity by following the email instructions. You may now return to [the FBO home page](#)."

- II. Once the location admin has completed the steps outlined in the email, the registrant's account must now wait for agency administrator approval prior to being able to logon to the system.
- III. Once approved, newly registered location admins 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 select Location Administrator “Login Here”.

The screenshot displays the FBO.gov homepage with three main login sections:

- Buyers / Engineers:** Government users may post, manage, and award opportunities. Includes fields for Username and Password, a Login button, and links for View Opportunities, Register Now, Password Reminder, and Recovery FAQs.
- Vendors / Citizens:** Vendors and citizens may search, monitor, and retrieve opportunities. Includes fields for Username and Password, a Login button, and links for Find Opportunities, Register Now, Password Reminder, and Recovery FAQs.
- Location / Agency Administrators:** Includes links for Login Here and Register Now. A yellow arrow labeled 'I' points to the 'Login Here' link.

Additional resources and demonstration videos are also visible on the right side of the page.

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

- I. That link takes the user to the "Administrator" interface for the system.
- II. On this screen, enter username and password to log into the system.
- III. Click "Go" to continue to logon.
- IV. The "Forgot My Password" option allows a user to request a password via email (user name must be known).
- V. To return to FBO home page (previous screen), click the "FBO Home page" link.
- VI. "For Help: Federal Service Desk" links directs the user to www.fsd.gov for assistance with the site.

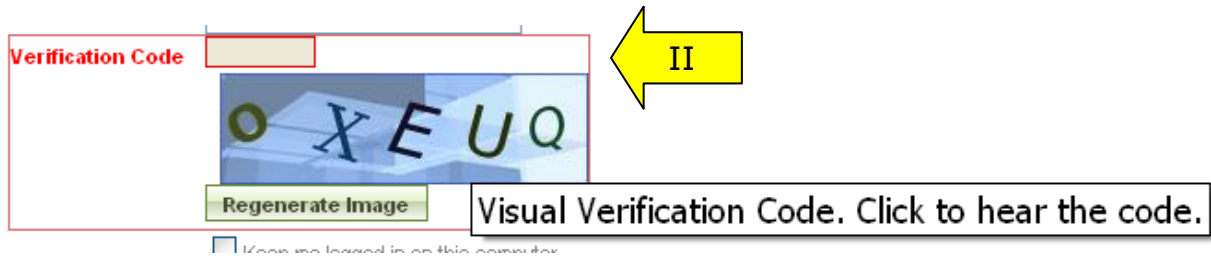
The screenshot shows the Admin Login page for FEDBizOPPS.GOV. The page has a blue header with the site logo and the text "Federal Business Opportunities". Below the header, there is a "Admin Login" section with two tabs: "Login" and "Forgot My Password". The "Login" tab is active. The login form includes fields for "Username:" and "Password:", a checkbox for "Keep me logged in on this computer", and "Go" and "Reset" buttons. At the bottom of the form, there are two links: "FBO Home page" and "For Help: Federal Service Desk".

Annotations on the screenshot:

- A yellow arrow labeled "IV" points to the "Forgot My Password" tab.
- A yellow arrow labeled "III" points to the "Go" button.
- A yellow arrow labeled "VI" points to the "For Help: Federal Service Desk" link.

2.4.1 Captcha Security

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



2.4.2 FBO Terms and Conditions

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

FBO Terms and Conditions

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

CONTROLLED UNCLASSIFIED INFORMATION PROPERTY OF THE UNITED STATES GOVERNMENT

DISCLOSURE, COPYING, DISSEMINATION, OR DISTRIBUTION OF CONTROLLED UNCLASSIFIED INFORMATION TO UNAUTHORIZED USERS IS PROHIBITED.

Please dispose of controlled unclassified information when no longer needed.

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 Federal Business Opportunities (FBO) 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 interception, monitoring, reading, capturing, recording, disclosure, copying, and/or inspection at the discretion of authorized FBO personnel. law

II

3 Location Admin's Secured Interface

3.1 "session time out"

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

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

3.2 Main Navigation

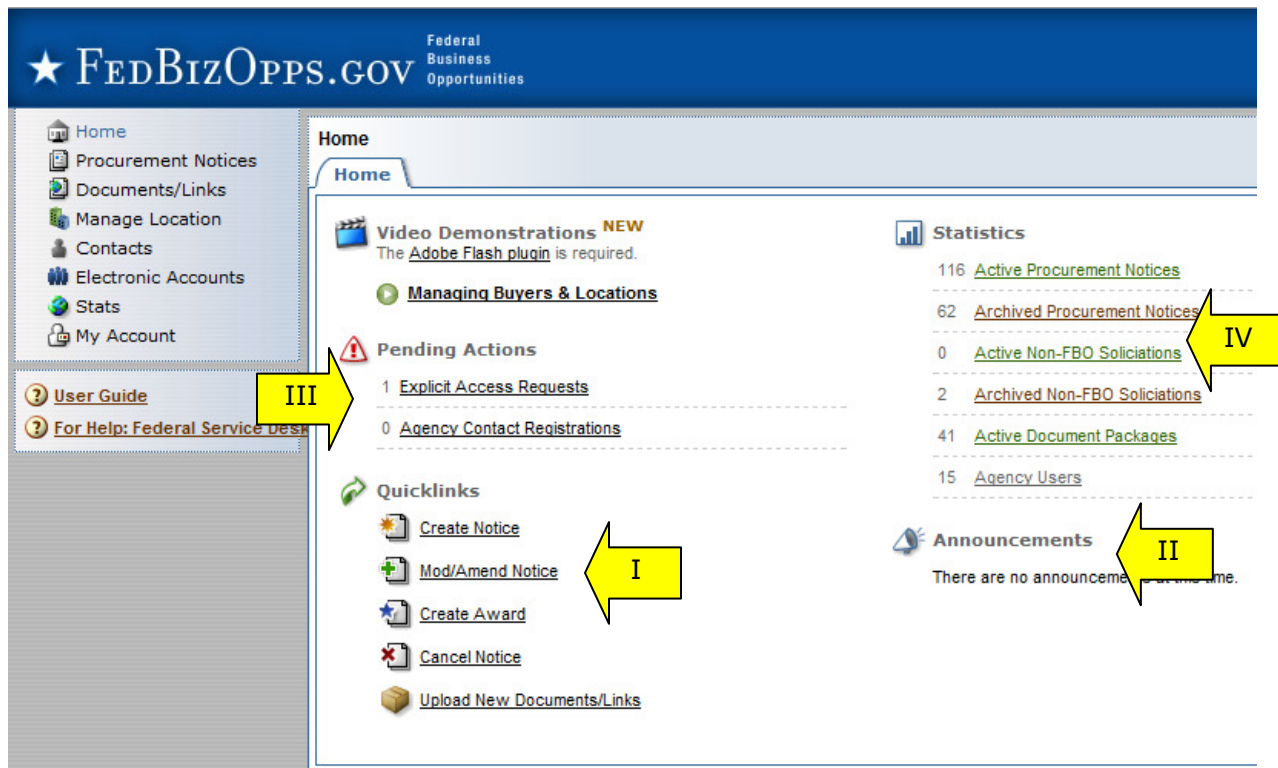
- I. Main Navigation for the Location Admin's Secured Interface appears down the left of the user's page. Using this navigation, users can move between the following key navigational elements: "Home," "Procurement Notices," "Documents/Links," "Manage Location," "Stats," "Contacts," "Electronic Accounts," and "My Account."

The screenshot displays the FEDBIZOPPS.GOV interface. The top header features the logo and the text "Federal Business Opportunities". The left sidebar contains a navigation menu with the following items: Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, My Account, User Guide, and For Help: Federal Service Desk. A yellow arrow labeled "I" points to this menu. The main content area is titled "Home" and includes sections for Video Demonstrations (with a note about the Adobe Flash plugin), Managing Buyers & Locations, Pending Actions (listing 1 Explicit Access Request and 0 Agency Contact Registrations), Quicklinks (listing Create Notice, Mod/Amend Notice, Create Award, Cancel Notice, and Upload New Documents/Links), Statistics (listing 116 Active Procurement Notices, 62 Archived Procurement Notices, 0 Active Non-FBO Solicitations, 2 Archived Non-FBO Solicitations, 41 Active Document Packages, and 15 Agency Users), and Announcements (stating there are no announcements at this time).

3.2.1 Home

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

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



3.2.2 Multi-account Users

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

The screenshot displays the user interface for FEDBIZOPPS.GOV. At the top, the header includes the site logo, the text 'Federal Business Opportunities', and the user's current session information: 'Tuesday, May 20, 2008 | 12:47 pm | User: nancy agency - DELAWARE RIVER BASIN COMMISSION'. A yellow arrow labeled 'III' points to the user's name and agency in the top right corner.

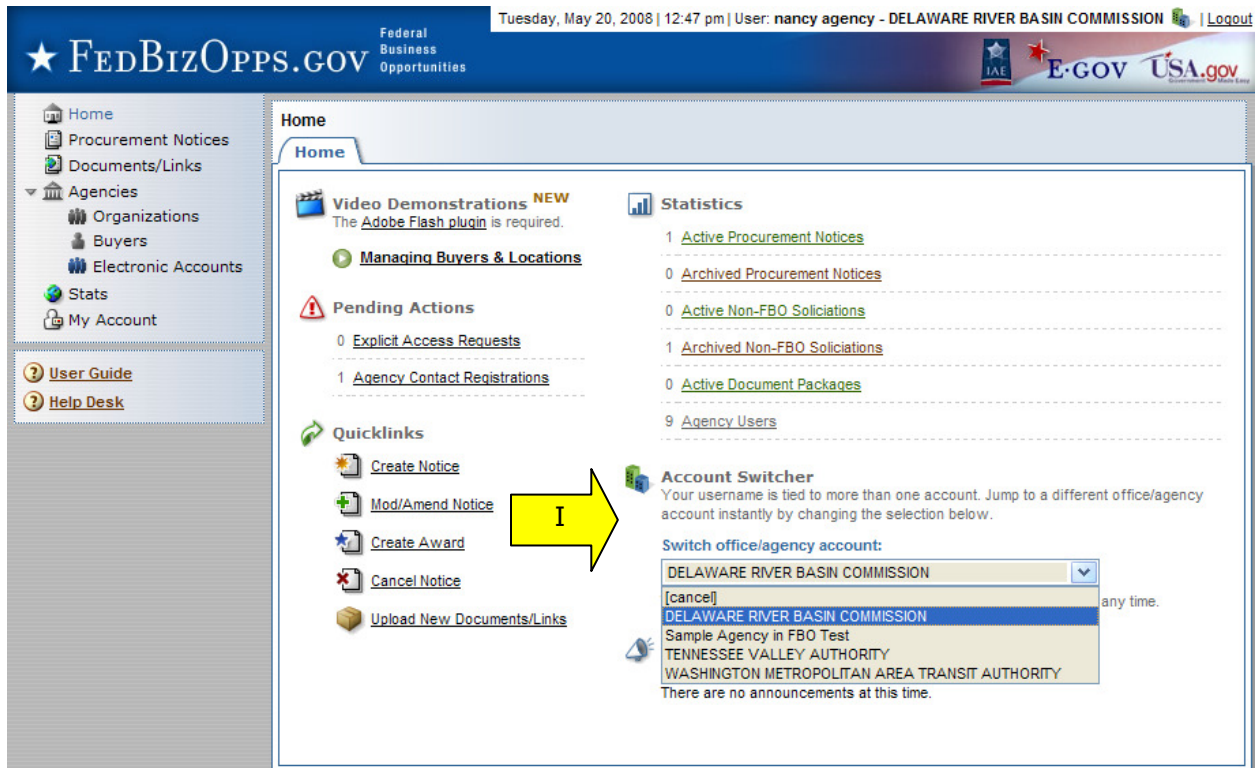
On the left side, there is a navigation menu with options: Home, Procurement Notices, Documents/Links, Agencies (with sub-options for Organizations, Buyers, and Electronic Accounts), Stats, and My Account. Below this menu are links for 'User Guide' and 'Help Desk'.

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

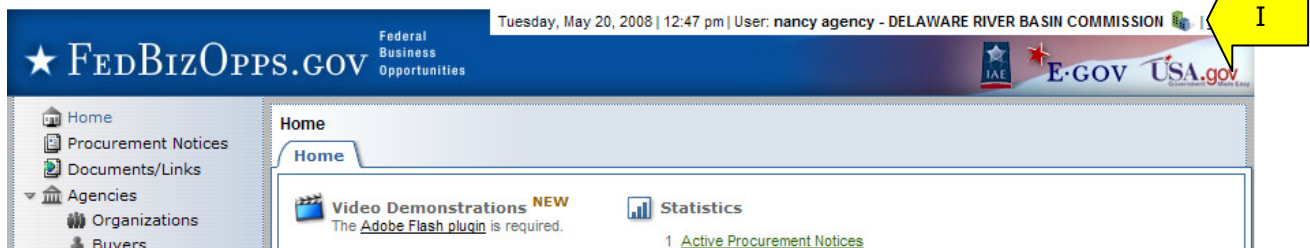
- Video Demonstrations NEW:** A notification that the Adobe Flash plugin is required.
- Managing Buyers & Locations:** A link to manage these settings.
- Pending Actions:** A list of actions including 'Explicit Access Requests' (0) and 'Agency Contact Registrations' (1).
- Quicklinks:** A list of actions such as 'Create Notice', 'Mod/Amend Notice', 'Create Award', 'Cancel Notice', and 'Upload New Documents/Links'.
- Account Switcher:** A section explaining that the user's username is tied to multiple accounts. It features a dropdown menu labeled 'Switch office/agency account:' with 'DELAWARE RIVER BASIN COMMISSION' selected. A yellow arrow labeled 'I' points to this dropdown menu. Below the dropdown is a tip: 'Tip: click the icon at the top of the page to switch accounts at any time.' (The icon referred to is the small globe icon in the top right header).
- Statistics:** A summary of counts for various items: 1 Active Procurement Notices, 0 Archived Procurement Notices, 0 Active Non-FBO Solicitations, 1 Archived Non-FBO Solicitations, 0 Active Document Packages, and 9 Agency Users.
- Announcements:** A section stating 'There are no announcements at this time.'

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

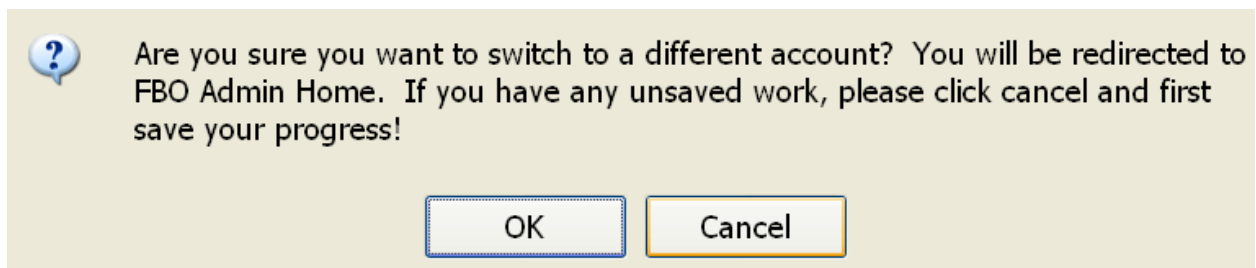
Home Page Option to switch account:



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



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



3.2.3 Procurement Notices

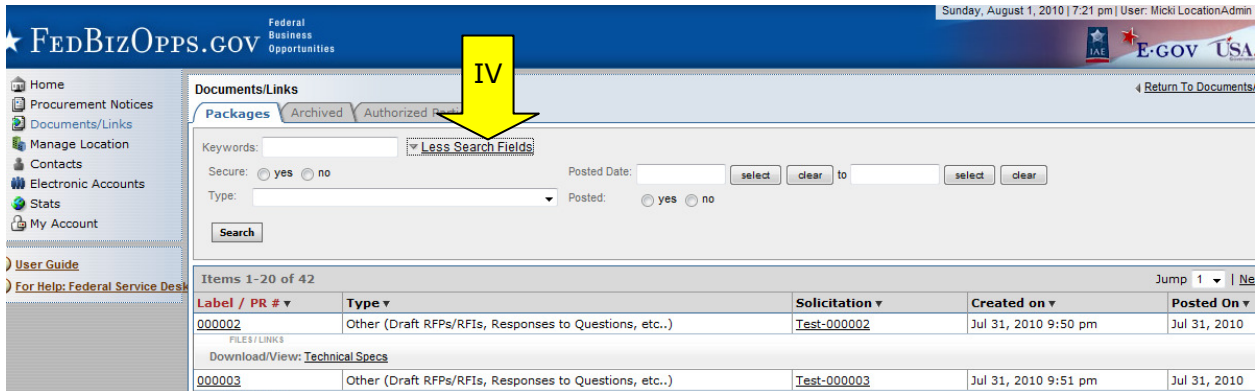
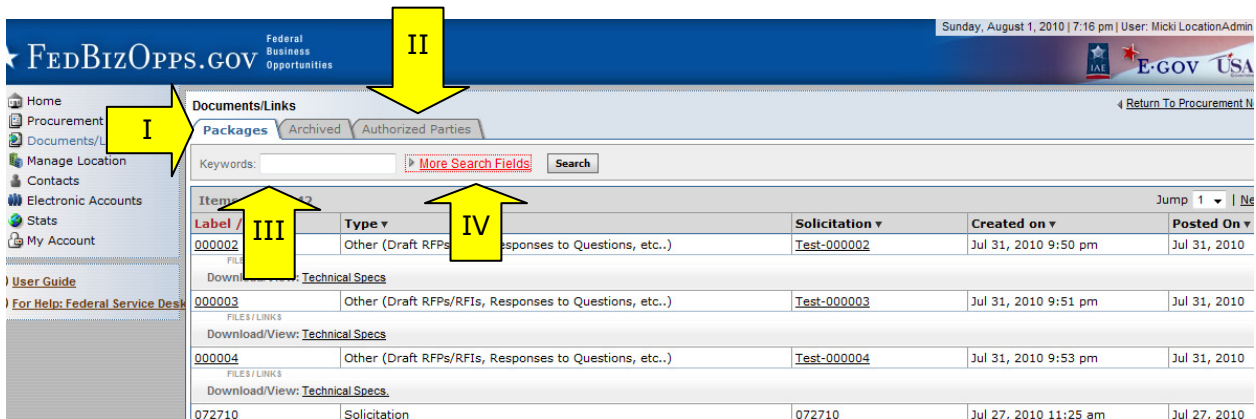
- I. There are four sub-tabs on the "Procurement Notices" page. "Procurement Notices" lists all "Posted" (viewable on vendor interface) notices.
- II. The "drafts" sub-tab lists draft notices (not viewable on vendor interface).
- III. The "archived" sub-tab presents a list of archived notices (not viewable on 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 links were previously managed through FedTeDS.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with the site logo and user information. Below this, a sidebar contains various navigation links. The main content area is titled "Procurement Notices" and features four sub-tabs: "Procurement Notices", "Drafts", "Archived", and "Non-FBO Solicitations". Four yellow arrows labeled I, II, III, and IV point to these sub-tabs respectively. Below the sub-tabs is a search bar and a table of procurement notices. The table has columns for Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. The first row shows a notice titled "Telephones" with a Sol/Ref Number of 123456789. Below the table, there is a section for "RELATED MODIFICATIONS / AWARDS" with two entries, each showing a "Draft Modification" that has been "Posted".

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

3.2.4 Document / Links

- I. There are three sub-tabs on the user's "Documents/Links" page. The "packages" sub-tab presents the list of active document packages associated with their registered agency/office and the "archived" sub-tab presents list of archived packages not viewable to vendors/public.
- II. The "authorized parties" tab has three sub tabs which enumerate, "authorized" vendors, "pending requests" for authorization, and "rejected requests" for authorization.
- III. The keywords search allows a user to conduct a full word search of the document title.
- IV. The "more search fields" link opens up additional search filters (less search fields" closes the added search filters).



3.2.5 Manage Location

- I. There are two sub-tabs on the user's "Manage Location" navigation.
- II. The "Edit Location" sub-tab displays the user's registered Location's profile; click the "Edit" button to make changes; once changes are made, click "Save" to save changes.
- III. The "Contacts" sub-tab presents a list of buyers/engineers for that office location.
- IV. The "Electronic Accounts" list users in the agency who are only able to submit notices via ftp/email accounts.
- V. Search filters are available to help find buyers and electronic account users. Use "More/Less search fields" links to add display/hide the search filters.
- VI. Use "Search" to submit a search.

FEDBIZOPPS.GOV Federal Business Opportunities

Office Integrated Acquisition Environment: Symplicity Test Location

Edit Location Contacts

Edit

Office Location Information

Code: SYMP
Name: Symplicity Test Location
Address: Wilson Blvd
Arlington, Virginia 22202
United States

Vendor View IML List Default: Default On
Vendor Add Themselves To IML List Default: Default

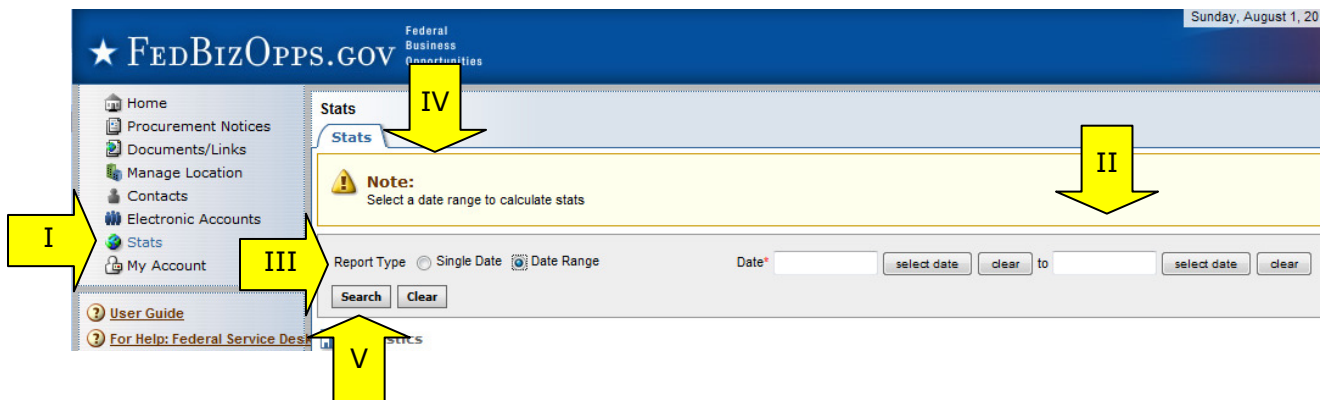
Allow CLIN Template: Allow
Allow Doc Package: Allow
Active: yes

Home
Procurement Notices
Documents/Links
Manage Location
Contacts
Electronic Accounts
Stats
My Account

[User Guide](#)
[For Help: Federal Service Desk](#)

3.2.6 Stats

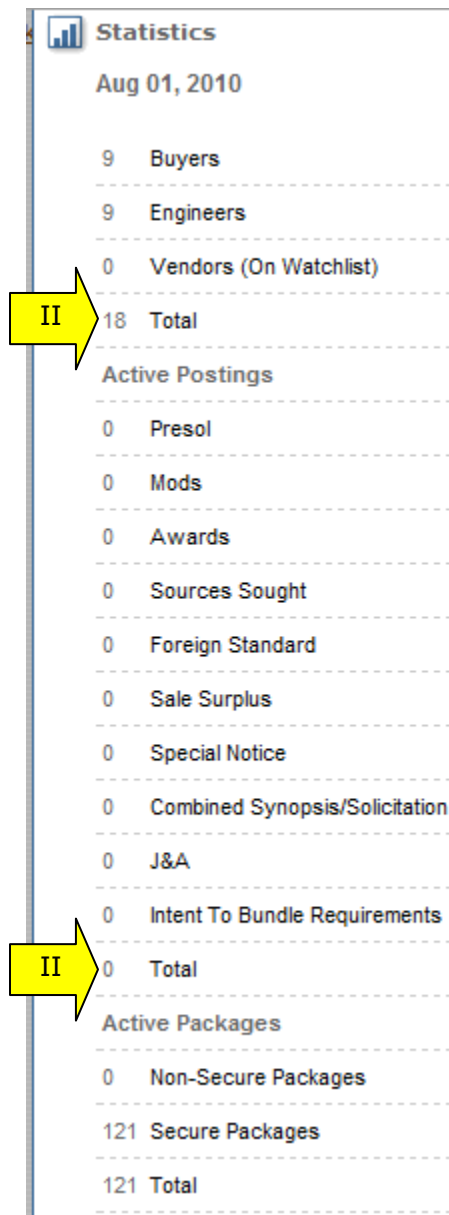
- I. "Stats" is a resource tool that allows the user to view FBO system activity for an organization.
- II. Data can be pulled for a particular day or for a range of days. When using range, queries are limited to 31 days for system performance reasons.
- III. If range is selected, each day's data will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



I. Stats Report Categories:

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

II. Totals are presented for each report category.



3.2.7 My Account

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

The screenshot displays the FEDBIZOPPS user interface. At the top, the header includes the logo and navigation links. The left sidebar contains a menu with 'My Account' highlighted. The main content area is titled 'Micki LocationAdmin: Contact Info' and features two tabs: 'Contact Information' (active) and 'Account'. Below the tabs are 'Edit' and 'Return' buttons. The 'Agency User Information' section displays the following details:

- Fullname: Micki LocationAdmin
- First Name: Micki
- Last Name: LocationAdmin
- Email: mmcmann@symplicity.com
- Phone: 7033510200

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

Agency Information	
Agency	FedTeDS Help Desk Agency
Office	FedTeDS Help Desk Organization
Location	FedTeDS Help Desk Location
Role(s)	Locationadmin

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

symp location admin: Contact Info

Agency Information

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

Agency User Information

Edit your personal information

Title:

Fullname*:

First Name:

Middle Name:

Last Name:

Suffix:

Email*:

Phone:

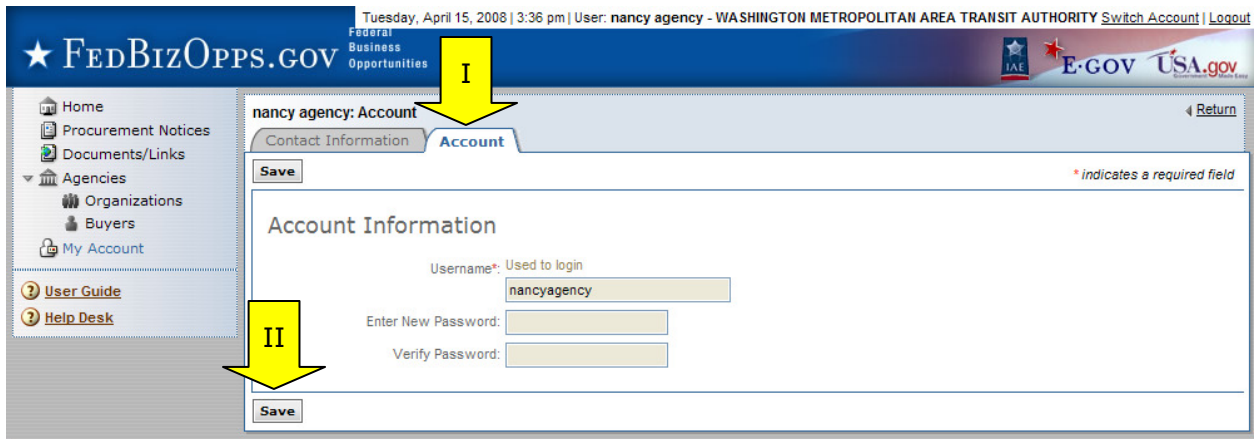
Cell Phone:

Fax:

I

Save Delete Return

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



4 Manage FBO Notices

4.1 Create Notice

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

The screenshot shows the FEDBIZOPPS.GOV interface. The top navigation bar includes the site logo, user information (Thursday, April 17, 2008 | 12:35 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and a Logout link. The left sidebar contains a navigation menu with 'Procurement Notices' highlighted by a yellow arrow labeled 'I'. The main content area displays a list of procurement notices under the heading 'Procurement Notices'. The list includes columns for Actions, Title, Sol/Ref Number, Type, Agency, Location, Posted, Response Deadline, and Modified. Two notices are visible: 'test solicitation' and 'Telephones'. Below the list, there are sections for 'RELATED MODIFICATIONS / AWARDS' and an 'Add New' button at the bottom, which is highlighted by a yellow arrow labeled 'II'.

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

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

4.1.1 Step 1 – NOTICE TYPE

The first step establishes the following fields for the Notice:

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

Create New Notice
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

1 Notice Type * indicates a required field

Complete all required fields and click **proceed** to continue to the next step.

Agency/Office:
 This field cannot be changed
 FedTeDS Help Desk Agency/FedTeDS Help Desk Organization

Contracting Office Location:
 This field cannot be changed
 FedTeDS Help Desk Location

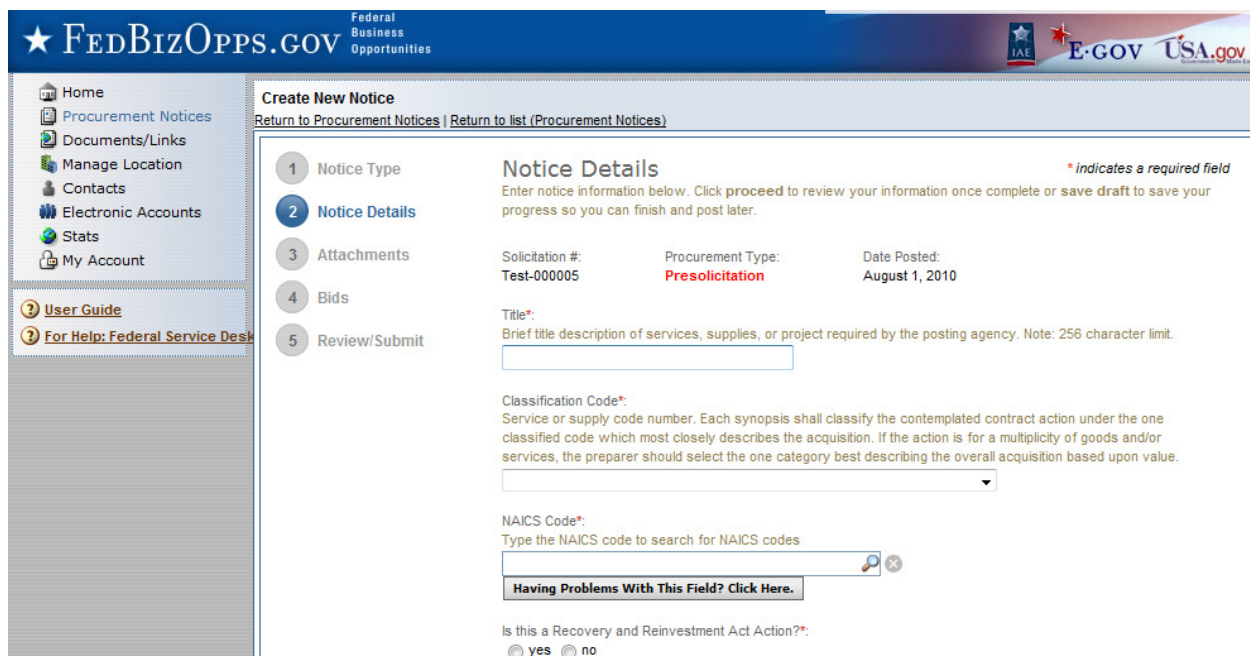
Type*:
 Presolicitation

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

V

4.1.2 Step 2 – NOTICE Details

- I. The second step establishes the following fields for the Notice (asterisks indicate required form field):
- Title* - description of services, supplies, or project required. NOTE: 256 character limit.
 - Classification Code* -
 - NAICS Code*
 - Recovery and Reinvestment Act Action
 - Response Date*
 - Primary Point of Contact*
 - Secondary Point of Contact
 - Description*
 - Place of Contact Performance
 - Set Aside
 - Archiving Policy* (note - notices archive the morning of this date).
 - Allow Vendors to Add/Remove From Interested Vendors*
 - Allow Vendors to View Interested Vendors List*



FEDBIZOPPS.GOV Federal Business Opportunities

Create New Notice
Return to Procurement Notices | Return to list (Procurement Notices)

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

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

Solicitation #	Procurement Type	Date Posted
Test-000005	Presolicitation	August 1, 2010

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

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

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

Having Problems With This Field? Click Here.

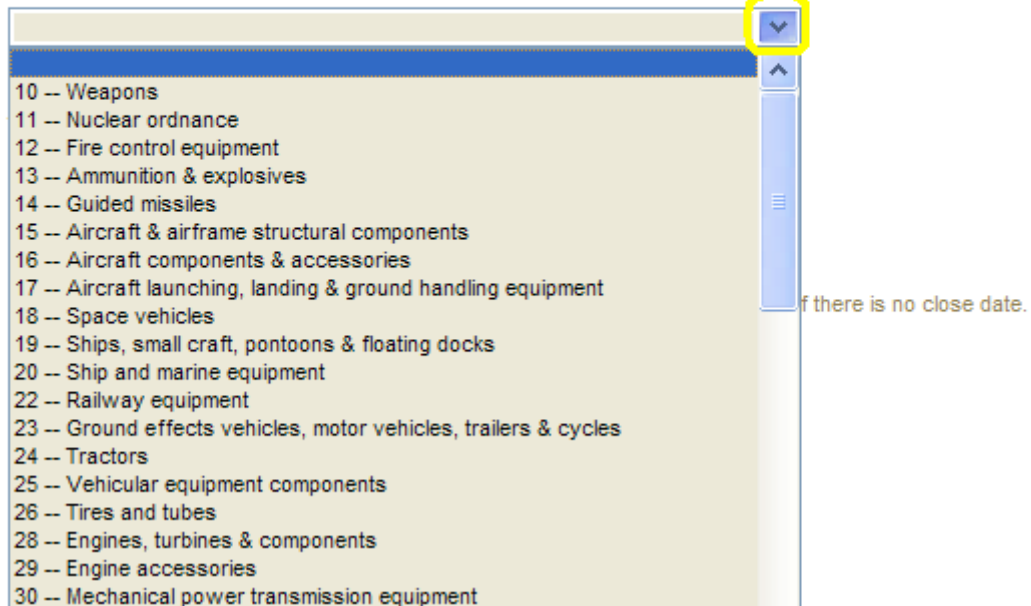
Is this a Recovery and Reinvestment Act Action?:
 yes no

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

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

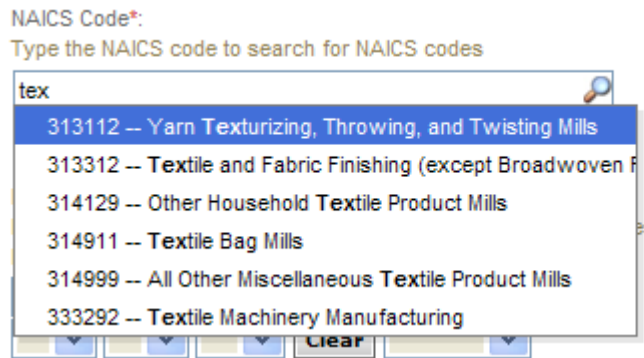
Classification Code*:

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



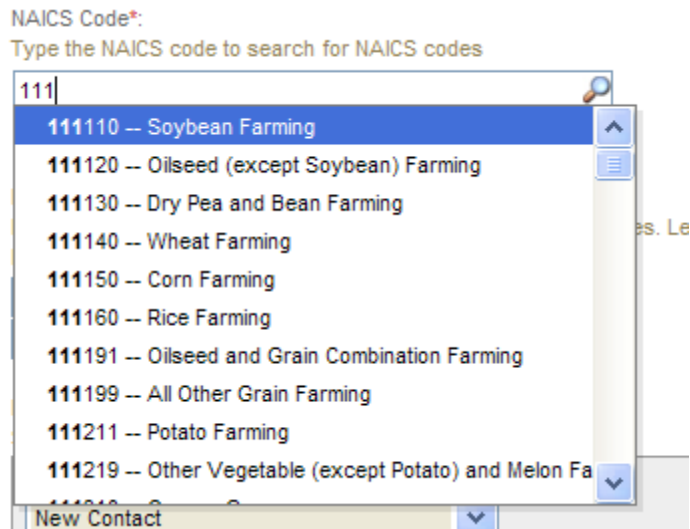
- III. Alternatively a user can type the code (e.g., "10" or "R") of the target value to navigate to the target selection and hit enter.

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



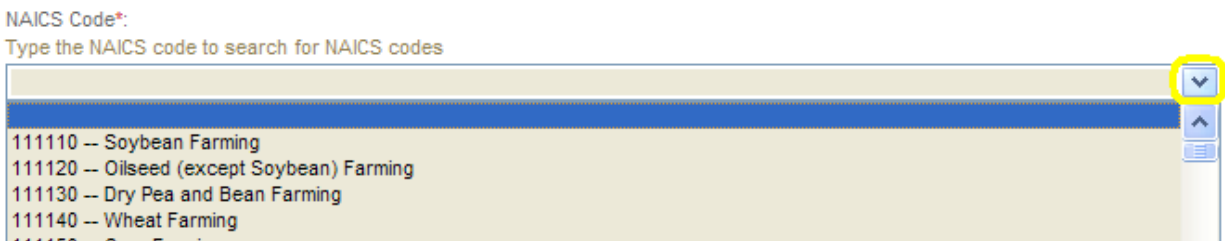
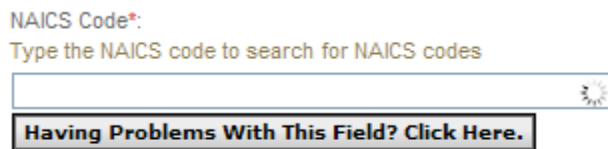
es. Leave empty if there

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

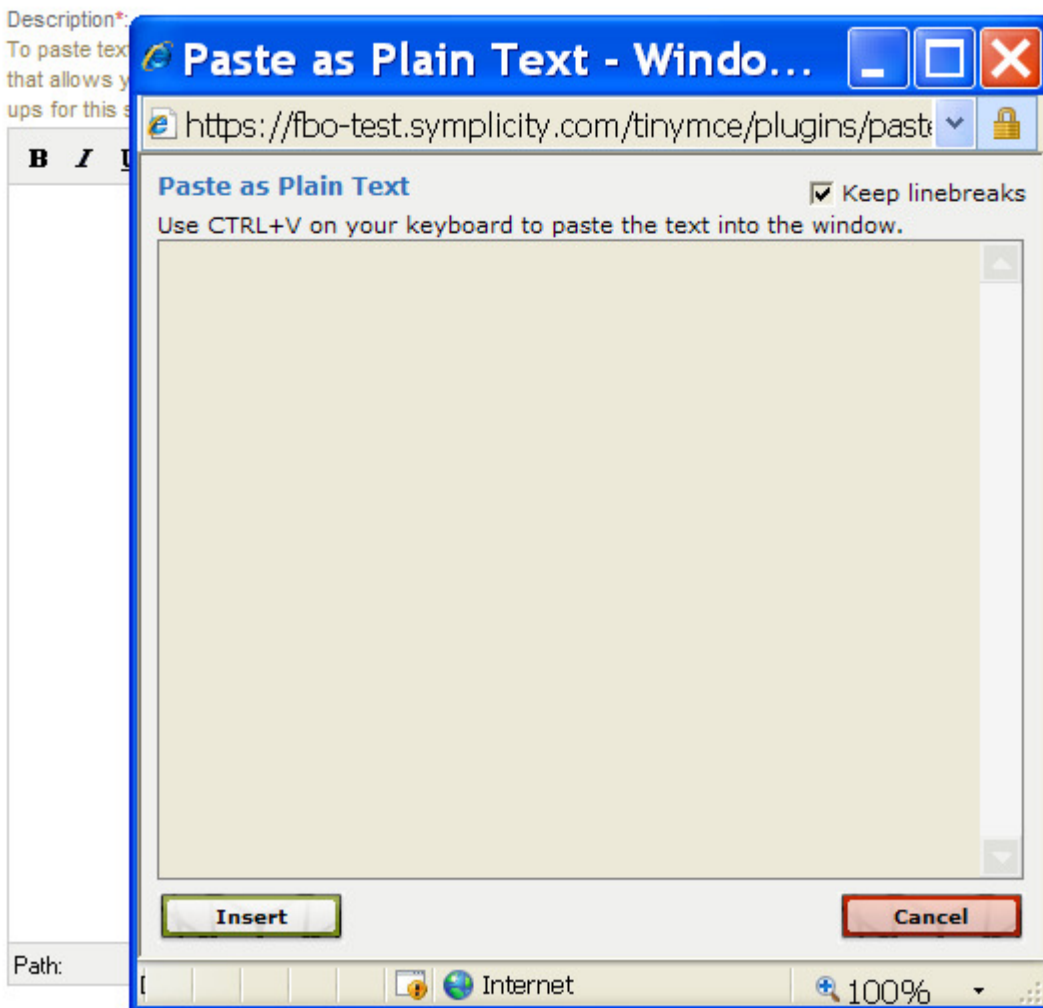


es. Le

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



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



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

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

Image of Notice list, displaying "draft" notice:

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

FEDBIZOPPS.GOV Federal Business Opportunities

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

Procurement Notices [Return](#)

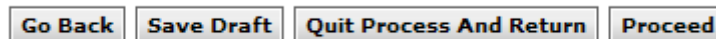
Procurement Notices Drafts Archived Non-FBO Solicitations

Keywords/SOL #: [More](#)

Items 1-20 of 31 Jump 1 | Next >

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

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



4.1.3 Step 3 – Attachments

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

The screenshot displays the 'Create New Notice' interface on the FEDBIZOPPS.GOV website. The page is titled 'Create New Notice' and includes navigation links for 'Return to Procurement Notices' and 'Return to list (Procurement Notices)'. A progress bar on the left indicates the current step is '3 Attachments'. The main content area is titled 'Attachments' and contains the text: 'Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents'. A large green button labeled 'Add New Package' is highlighted with a yellow arrow and the Roman numeral 'IV'. Below this button are four smaller buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'. The top of the page features the FEDBIZOPPS.GOV logo and the text 'Federal Business Opportunities', along with logos for IAE, E-GOV, and USA.gov.

Controlled, Unclassified Attachments

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

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

Business Opportunities

notice: testnotice415 - newnotice415

Attachments

* indicates a required field

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

Package #1

Is this package sensitive/secure?*

yes no

Add New Package

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

- I. If attaching sensitive/secure packages, the user is given the option to enter a new package or to select an existing (enter the PR# and use the "find package" button).
- II. Users must also determine the Package Type; options will align with the notice type.

Create New Notice
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

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

Package #1 [Remove Package](#)

Is this package sensitive/secure?*

yes no

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

Create New **Attach/Select Existing**

Package Type*:

This is a presolicitation notice, solicitation documents cannot be uploaded at this time.
 Mod/Amendment cannot be selected for base notices.

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

Select PR # From Your Office:

If not found above, Enter PR # To Search Existing:
 Use "find package" to find that pr on the system if it already exists.
 [Find Package](#)

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

Is this Export Controlled?*

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

yes no


Explicit Access*:

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

yes no

Is CD Available*:

yes no

 **File / Link #1**

File*:

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

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


Description*:

Enter in a short description for this file/link



Non-Secure Attachments

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

 **Package #1** [Remove Package](#)

Is this package sensitive/secure?*

yes no


Package Type*:

This is a presolicitation notice, solicitation documents cannot be uploaded at this time.
Mod/Amendment cannot be selected for base notices.

Solicitation

Mod/Amendment

Other (Draft RFPs/RFIs, Responses to Questions, etc..)

 **File / Link #1**

Type*:

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

upload link

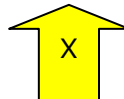
File*:

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

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

Description*:

Enter in a short description for this file/link



4.1.4 Step 4 – Review / Submit

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

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

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

FEDBIZOPPS.GOV Federal Business Opportunities

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

Base Notice: test - test33

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

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

Go Back Save Draft Quit Process And Return
Delete Print Post

Notice Details

Solicitation #: test33 Procurement Type: Combined Synopsis/Solicitation

Date Posted: April 16, 2008

Title: test


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

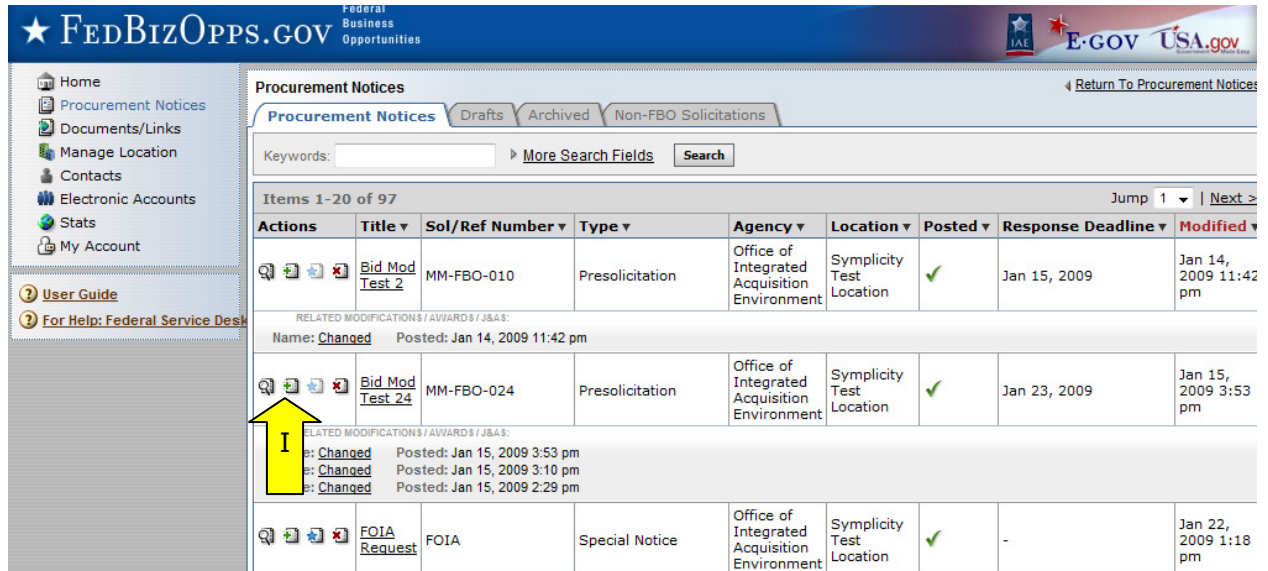
NAICS Code: 111130 -- Dry Pea and Bean Farming

Response Date: Mar 31, 2008 5:00 pm

Primary Point of Contact:

4.2 Modify/Amend Notice

- I. From any page on the system, a user can go to left navigation "Procurement Notices" link 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 "Home" page to modify / amend a notice.






FEDBIZOPPS.GOV Federal Business Opportunities

Procurement Notices [Return To Procurement Notices](#)

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords: [More Search Fields](#)

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Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 15, 2009	Jan 14, 2009 11:42 pm
RELATED MODIFICATIONS / AWARDS / JBAs:								
Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3:53 pm
RELATED MODIFICATIONS / AWARDS / JBAs:								
#: Changed Posted: Jan 15, 2009 3:53 pm								
#: Changed Posted: Jan 15, 2009 3:10 pm								
#: Changed Posted: Jan 15, 2009 2:29 pm								
	FOIA Request	FOIA	Special Notice	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	-	Jan 22, 2009 1:18 pm

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

The screenshot displays the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo and the text 'Federal Business Opportunities'. The main content area is titled 'New Amendment for Bid Mod Test 2 - MM-FBO-010' and includes links to 'Return to Procurement Notices' and 'Return to list (Procurement Notices)'. A progress bar on the left lists six steps: 1. Notice Type, 2. Modification, 3. Notice Details, 4. Attachments, 5. Bids, and 6. Review/Submit. A yellow arrow labeled 'I' points to step 2, 'Modification'. The 'Modification Details' section contains the question 'Where do you want to start the modification process*:' and three radio button options: 'Notice Details, add/edit description', 'Attachments, attach Files', and 'Bids (CLIN / Doc Packages)'. A note indicates that an asterisk (*) denotes a required field. At the bottom of the form are three buttons: 'Go Back', 'Quit Process And Return', and 'Proceed'. A left-hand navigation menu includes links for Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, My Account, User Guide, and For Help: Federal Service Desk.

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).

Tuesday, April 15, 2008 | 6:30 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY [Switch Account](#) | [Logout](#)

FEDBIZOPPS.GOV Federal Business Opportunities

IAE E-GOV USA.gov

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

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


Modification Details * indicates a required field

Where do you want to start the modification process*:

Notice Details, add/edit description
 Attachments, attach Files

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

Edit Existing Description
 Add To Description



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

Notice Details

** indicates a required field*

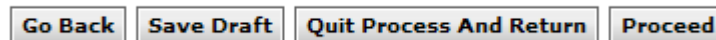
You may update notice information below. Note that many fields are locked and cannot be changed from the base notice. When are you satisfied with your changes, you can click **save draft** to save this Modification/Amendment for later. Otherwise, click **proceed** to review your information

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

Add The Following To Description*:

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

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



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

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

Secure Attachments

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

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

Home
Procurement Notices
Documents/Links
Manage Location
Contacts
Electronic Accounts
Stats
My Account

1 Notice Type
2 Modification Type
3 Notice Details
4 Attachments
5 Bids
6 Review/Submit

New Amendment for Bid Mod Test 2 - MM-FBO-010
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

Attachments

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

Package #1 Remove Package

Is this package sensitive/secure?*

yes no

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

Create New Attach/Select Existing

Package Type*

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

- I. If attaching controlled, unclassified documents, the user is given the option to enter a new package or to select an existing one (enter the PR# and use the "find package" button).
- II. The user must also identify the Package Type; options will align with the notice type.

New Amendment for Bid Mod Test 2 - MM-FBO-010
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

- 1 Notice Type
- 2 Modification Type
- 3 Notice Details
- 4
Attachments- 5 Bids
- 6 Review/Submit

Attachments * indicates a required field

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

Package #1
Remove Package

Is this package sensitive/secure?*

yes no

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

Create New Attach/Select Existing

Package Type*:

Solicitation

Mod/Amendment

Other (Draft RFPs/RFIs, Responses to Questions, etc..)

Select PR # From Your Office:

If not found above, Enter PR # To Search Existing*:

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

Find Package

Remove Package




- 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.

Attachments

** indicates a required field*

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

 **Package #1**
Remove Package

Is this package sensitive/secure?*

yes no

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

Create New Attach/Select Existing

Package Type*:

Solicitation

Mod/Amendment

Other (Draft RFPs/RFIs, Responses to Questions, etc..)

PR #*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

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

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

yes no

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

yes no

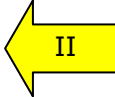
Is CD Available*:
 yes no

 **File / Link #1**

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

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

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



Non-Secure Attachments

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

Attachments

* indicates a required field

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

 **Package #1**

Is this package sensitive/secure?*

yes no


Package Type*:

Solicitation

Mod/Amendment

Other (Draft RFPs/RFIs, Responses to Questions, etc..)

Remove Package

 **File / Link #1**

Type*:

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

upload link

File*:

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

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

Description*:

Enter in a short description for this file/link

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

[Remove Package](#)

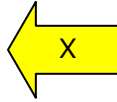
[Add New Package](#)

[Go Back](#)

[Save Draft](#)

[Quit Process And Return](#)


[Proceed](#)



- I. At step five, the user is able to review materials, and if appropriate to “post” the modification/amendment for vendor review. Note: If the Bid Module is enabled, Step 5 would be the “Bids” step.
- II. “Go back” allows the user to go back in the stepwise process.
- III. The “save draft” button saves the modifications in draft format.
- IV. “Quit Process And Return” returns the user to the previous navigation.
- V. “Post” moves the notice for review by users.

The screenshot displays the FEDBIZOPPS.GOV interface for creating a new amendment. The page title is "New Amendment for Bid Mod Test 2 - MM-FBO-010". A navigation sidebar on the left includes links for Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. The main content area features a progress indicator with six steps: 1. Notice Type, 2. Modification Type, 3. Notice Details, 4. Attachments, 5. Bids, and 6. Review/Submit (the current step). A green callout box titled "On this step:" provides instructions: "Please review your notice information. If satisfied, click post to finalize your notice. You may click save draft to save your work for a later time, or can click go back to modify the information." Below this box are buttons for "Go Back", "Save Draft", "Quit Process And Return", "Print", and "Post". A yellow arrow labeled "V" points to the "Post" button. The "Modification Details" section asks where to start the modification process and offers to edit an existing description. The "Notice Details" section shows the solicitation number (MM-FBO-010), procurement type (Modification/Amendment), and date posted (August 1, 2010).

4.3 Create Award

- I. From any page on the system, a user can go to left navigation "Procurement 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 "Home" 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.

Procurement Notices [Return To Procurement Notices](#)

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords: [Less Search Fields](#)

Type: Presolicitation Combined Synopsis/Solicitation Sources Sought Response Date: to



Modification/Amendment/Cancel Sale of Surplus Property Special Notice

Foreign Government Standard Award Notice Justification and Approval (J&A)

Intent to Bundle Requirements (DoD-Funded)

Date Posted: to

Items 1-20 of 97 Jump 1 | Next >

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symplicity Test Location	✓	Jan 15, 2009	Jan 14, 2009 11:42 pm
<small>RELATED MODIFICATIONS / AWARDS / J&As:</small>								
Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symplicity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3:53 pm
<small>MODIFICATIONS / AWARDS / J&As:</small>								
Name: Changed Posted: Jan 15, 2009 3:53 pm								
Name: Changed Posted: Jan 15, 2009 3:10 pm								
Name: Changed Posted: Jan 15, 2009 2:29 pm								

- I. In creating an award notice, the user is required to enter the contract award date, contract award number, contract dollar amount, and awarded contractor name.
- II. Contract Line Item Number, Contract Awarded DUNS, and Contractor Awarded Address 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).
- IV. **Note: See section 4.1.3 for detailed information on this step.**

The screenshot displays the 'New Award for FOIA Request - FOIA' web interface. On the left is a navigation menu with items: Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, My Account, User Guide, and For Help: Federal Service Desk. The main content area has a breadcrumb trail: 'Return to Procurement Notices | Return to list (Procurement Notices)'. Below this is a progress indicator with four steps: 1 Notice Type, 2 Notice Details, 3 Attachments (highlighted with a blue circle), and 4 Review/Submit. A yellow arrow labeled 'III' points to the 'Add New Package' button in the Attachments section. The Attachments section title is 'Attachments' with a red asterisk indicating a required field. Below the title is a text instruction: 'Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents'. At the bottom of the interface are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'.

Non-Sensitive Attachments

- I. After the document package(s) have been added, if applicable, the user can take any of the following actions:
- "Go Back" button (bottom of form) takes the user back to step two in the process.
 - "Save Draft" saves the materials to the draft notice.
 - "Quit Process and Return" does not attach the materials.
 - "Proceed" takes the user to the next step in notice creation process.

1 Notice Type

2 Notice Details

3 **Attachments**

4 Review/Submit

Attachments * indicates a required field

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

Package #1 Remove Package

Is this package sensitive/secure?*

yes no

File / Link #1

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

upload link

Web Link*:


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

Remove This File / Link

Add Another File / Link To This Package

Remove Package


Add New Package

Go Back Save Draft Quit Process And Return Proceed 

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

New Award for FOIA Request - FOIA
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)


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

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


Go Back**Save Draft****Quit Process And Return****Print****Post**

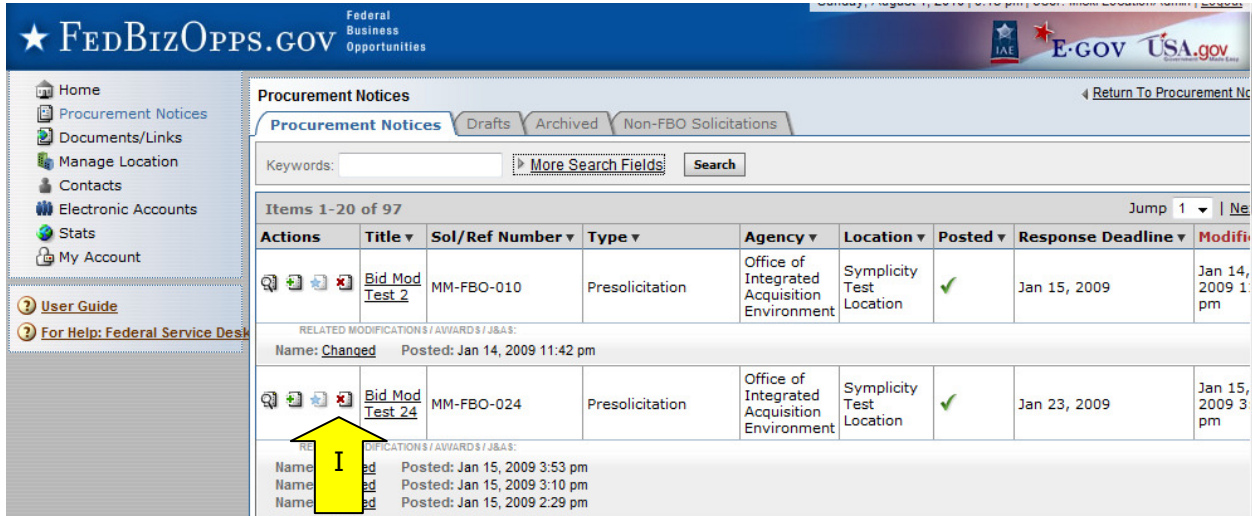
Notice Details

Solicitation #: FOIA	Procurement Type: Award Notice	Date Posted: August 1, 2010
Title: FOIA Request		
Classification Code: 99 -- Miscellaneous		
NAICS Code: 541990 -- All Other Professional, Scientific, and Technical Services		
Is this a Recovery and Reinvestment Act Action?: no		



4.4 Cancel Notice

- I. From any page on the system, a user can go to left navigation "Procurement 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 "Home" page to cancel a notice.





FEDBIZOPPS.GOV Federal Business Opportunities

Procurement Notices

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords: [More Search Fields](#)

Items 1-20 of 97 Jump 1 | [New](#)

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 15, 2009	Jan 14, 2009 1 pm
RELATED MODIFICATIONS / AWARDS / JBAs: Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3 pm
RELATED MODIFICATIONS / AWARDS / JBAs: Name: I ed Posted: Jan 15, 2009 3:53 pm Name: I ed Posted: Jan 15, 2009 3:10 pm Name: I ed Posted: Jan 15, 2009 2:29 pm								

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

Cancellation for Bid Mod Test 2 - MM-FBO-010
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

1 Notice Type

2 **Notice Details**

3 Review/Submit

Cancellation Details * indicates a required field

Please provide a cancellation notice

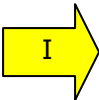
Solicitation #: MM-FBO-010	Procurement Type: Cancellation	Date Posted: August 1, 2010
-------------------------------	--	--------------------------------

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

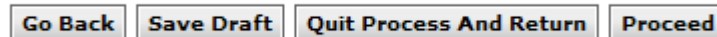
Cancellation Description*:

B *I* U [List Icons] [Image Icon] [Table Icon] [ABC Icon]

Path: p



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



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

Cancellation for Bid Mod Test 2 - MM-FBO-010
[Return to Procurement Notices](#) | [Return to list \(Procurement Notices\)](#)

- 1 Notice Type
- 2 Notice Details
- 3 **Review/Submit**

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

Go Back
Save Draft
Quit Process And Return
Print
Post

V

Notice Details

Solicitation #: MM-FBO-010 Procurement Type: **Cancellation** Date Posted: August 1, 2010

Title:
Bid Mod Test 2

Cancellation Description:
Test

Classification Code:
93 – Nonmetallic fabricated materials

NAICS Code:
541990 -- All Other Professional, Scientific, and Technical Services

Is this a Recovery and Reinvestment Act Action?:
no

4.5 Deletion of Draft Notices



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

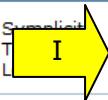
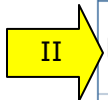
Procurement Notices Return To Procurement Notices

Procurement Notices Drafts Archived Non-FBO Solicitations

Keywords: [More Search Fields](#)

Items 1-20 of 97 Jump 1 | Next

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modified
		MM-FBO-130	Presolicitation	Office of Integrated Acquisition Environment	Symplicity Test Location	x	-	Mar 18, 2010 4:00 pm
		Award:	Intent to Bundle Requirements (DoD-Funded)	Office of Integrated Acquisition Environment	Symplicity Test Location	x	-	Jul 30, 2010 4:00 pm



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

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

4.6 Archive Notices

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

The screenshot shows the 'Procurement Notices' page on FEDBIZOPPS.GOV. The page has a navigation menu on the left and a main content area. The main content area displays a table of notices. A yellow arrow labeled 'I' points to the review icon (a magnifying glass) for the notice 'Bid Mod Test 2'.

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modifi
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symplicity Test Location	✓	Jan 15, 2009	Jan 14, 2009 1 pm
RELATED MODIFICATIONS / AWARDS / JS&S: Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symplicity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3 pm
RELATED MODIFICATIONS / AWARDS / JS&S: Name: Changed Posted: Jan 15, 2009 3:53 pm Name: Changed Posted: Jan 15, 2009 3:10 pm Name: Changed Posted: Jan 15, 2009 2:29 pm								

The screenshot shows the 'Notice Information' page for the notice 'Bid Mod Test 2 - MM-FBO-010'. The page has a navigation menu on the left and a main content area. The main content area displays a yellow note and a row of buttons: 'Return To List', 'Modify/Amend', 'Archive', and 'Print'. A yellow arrow labeled 'II' points to the 'Archive' button.

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

Return To List Modify/Amend **Archive** Print

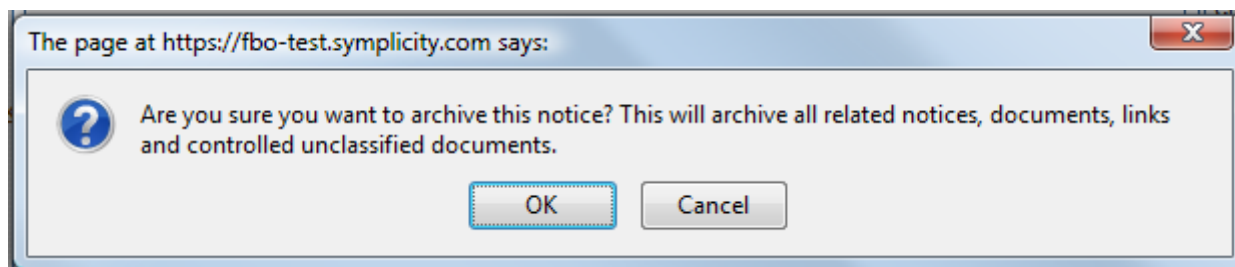
Notice Information

Solicitation:
MM-FBO-010

Agency/Office:
Office of Integrated Acquisition Environment

Location:
Symplicity Test Location

- I. User will be asked to confirm the “archive”.



4.7 Unarchive Notices

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

The screenshot shows the 'Procurement Notices' interface with the 'Archived' sub-tab selected. A table lists two notices. A yellow arrow labeled 'II' points to the view icon (an eye) next to the second notice, 'MM-FBO-127'.

	Title ▼	Sol/Ref # ▼	Agency ▼	Location ▼	Type ▼ / Set-aside ▼	Archived On ▲
	75--THE DEPT. OF THE TREASURY TECHNOLOGY EXPO: WASHINGTON, D.C.TUESDAY, JULY 30, 1999		GENERAL SERVICES ADMINISTRATION Office of Integrated Acquisition Environment Symlicity Test Location	Symlicity Test Location	Special Notice	Jul 31, 2010 4:35 am
	MM-FBO-127	MM-FBO-127	GENERAL SERVICES ADMINISTRATION Office of Integrated Acquisition Environment Symlicity Test Location	Symlicity Test Location	Combined Synopsis/Solicitation	Jun 03, 2010 4:35 am



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

The screenshot displays a web application interface for managing procurement notices. The main content area shows a notice titled "Base Notice: 75--THE DEPT. OF THE TREASURY TECHNOLOGY EXPO: WASHINGTON, D.C.TUESDAY, JULY 30, 1999 - (Archived)". The notice is currently in an archived state, as indicated by the "(Archived)" label and the "Notice Information" tab. A yellow arrow points to the "Unarchive" button, which is highlighted. A confirmation dialog box is overlaid on the screen, asking "Are you sure you want to unarchive this notice? This will unarchive all related notices, documents, links and controlled unclassified documents." The dialog box has "OK" and "Cancel" buttons. The right sidebar contains a "Procurement Notice (Archived) Info" section with fields for "Created" (March 31, 2010 11:59 am) and "Modified" (July 31, 2010 4:35 am), and a "General Information" section with fields for "Notice Type" (Special Notice), "Posted Date" (March 31, 2010), "Response Date" (-), "Archiving Policy" (Automatic, on specified date), and "Archive Date" (-).

4.8 Print Notices

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

The screenshot shows the 'Procurement Notices' page on FEDBIZOPPS.GOV. The page includes a navigation menu on the left with options like Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. The main content area displays a list of notices. The table below shows the details of two notices:

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modifi
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symplcity Test Location	✓	Jan 15, 2009	Jan 14, 2009 1 pm
RELATED MODIFICATIONS / AWARDS / J&As: Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symplcity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3 pm
RELATED MODIFICATIONS / AWARDS / J&As: ne: Changed Posted: Jan 15, 2009 3:53 pm ne: Changed Posted: Jan 15, 2009 3:10 pm ne: Changed Posted: Jan 15, 2009 2:29 pm								

The screenshot shows the 'Notice Information' page for 'Bid Mod Test 24 - MM-FBO-024'. The page includes a navigation menu on the left with options like Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. The main content area displays a yellow 'Note' box with the text: 'This notice has been posted. Any changes must be done in the form a new modification/amendment notice'. Below the note is a row of buttons: 'Return To List', 'Modify/Amend', 'Archive', and 'Print'. A yellow arrow labeled 'II' points to the 'Print' button.

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

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

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

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

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

4.9 Review Interested Vendors List

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

FEDBIZOPPS.GOV Federal Business Opportunities



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

Home | Procurement Notices | Documents/Links | Manage Location | Contacts | Electronic Accounts | Stats | My Account

Procurement Notices | Drafts | Archived | Non-FBO Solicitations

Keywords: [More Search Fields](#)

Items 1-20 of 97 Jump 1 | Ne

Actions	Title	Sol/Ref Number	Type	Agency	Location	Posted	Response Deadline	Modifi
	Bid Mod Test 2	MM-FBO-010	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 15, 2009	Jan 14, 2009 1 pm
Name: Changed Posted: Jan 14, 2009 11:42 pm								
	Bid Mod Test 24	MM-FBO-024	Presolicitation	Office of Integrated Acquisition Environment	Symlicity Test Location	✓	Jan 23, 2009	Jan 15, 2009 3 pm
Name: Changed Posted: Jan 15, 2009 3:53 pm								
Name: Changed Posted: Jan 15, 2009 3:10 pm								
Name: Changed Posted: Jan 15, 2009 2:29 pm								

FEDBIZOPPS.GOV Federal Business Opportunities


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

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

417buyersol - 78979a8sd7f | Notice Information | Packages | **Interested Vendors**

Keywords:

Results: Items 1-1 of 1

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

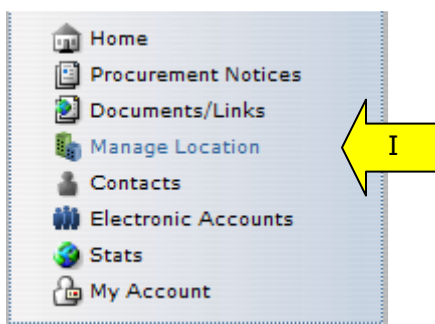
Items 1-1 of 1

5 Bid Module

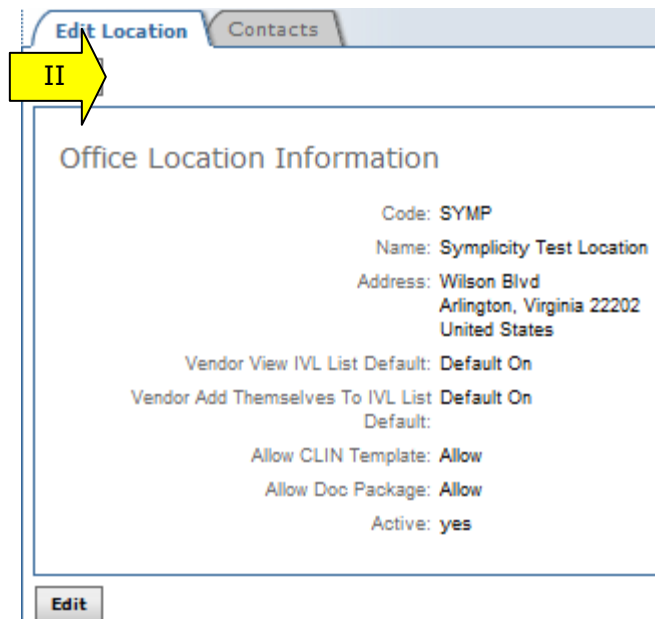
The Bid Module functionality allows buyers to receive and electronically evaluate vendor responses to notices. There are two possible types of electronic submissions, an Item (CLIN) Builder form and a Doc Package upload. Administrators determine whether or not their buyers are allowed to enable this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

5.1 Enable / Disable Bid Module

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



IV. Click on the "Edit" button.



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

- i. "Allow CLIN Template:"

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

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

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

Yellow arrows labeled 'i' and 'ii' point to the 'CLIN Template' and 'Allow Doc Package' options, respectively.

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

5.2 Create Notice

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

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

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

Create New Notice

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

Bids

* indicates a required field

CLIN:

The screenshot shows a web form titled "Edit CLIN information" with a light green background. It contains two main sections for "Line Item" and "Child Line Item".

- Line Item Section:**
 - Label: "Line Item Description*" (with an asterisk indicating a required field). Subtext: "Provide a brief description about the Line Item".
 - Text input field: "Line Item #1" (containing the text "Line Item #1").
 - Label: "Quantity*" (with an asterisk). Subtext: "Enter the quantity of line item".
 - Text input field: "1000".
 - Label: "Children:". Subtext: "Add a child line item".
- Child Line Item Section:**
 - Label: "Child Line Item Description*" (with an asterisk). Subtext: "Provide a brief description about the Line Item".
 - Text input field: "Child Line Item #1" (containing the text "Child Line Item #1").
 - Label: "Quantity*". Subtext: "Enter the quantity of line item".
 - Text input field: "500".
 - Label: "Children:". Subtext: "Add a child line item".

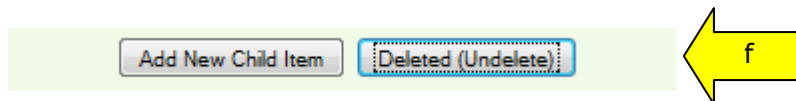
At the bottom of the form, there are two rows of buttons:

- Row 1: "New Child Item" (highlighted with arrow 'd') and "Delete Child Line Item".
- Row 2: "Add New Child Item" and "Delete" (highlighted with arrow 'e').

Yellow callout arrows are placed as follows:

- 'a' points to the "Line Item Description*" label.
- 'b' points to the "Quantity*" label.
- 'd' points to the "New Child Item" button.
- 'e' points to the "Delete" button.

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



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

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

Create New Notice

1 Notice Type

2 Notice Details

3 Attachments

4 Bids

- Type
- Clin Template
- Review

5 Review/Submit

Bids * indicates a required field

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


CLIN:

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

Go Back Save Draft Quit Process And Return Proceed

- VII. The Buyer has four options at the bottom of this page:
- 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 4.1.4 for more information on the next step.

5.3 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 4.2.)
- 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 4.2)
 - b. attach files to the notice (see section 4.2)
 - c. bids (CLIN/Doc Packages)

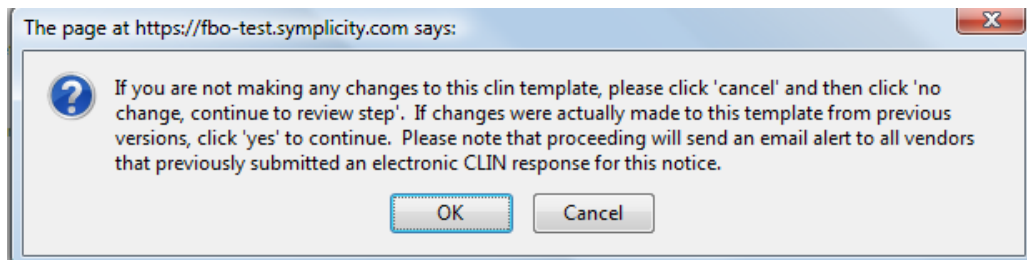
New Amendment for Bid Mod Test 39 - MM-FBO-039

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

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


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

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



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

5.4 Manage Vendor Electronic Responses

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

Base Notice: Bid Mod Test 39 - MM-FBO-039

RETURN RETURN TO LIST (NOTICES)

Notice Information Packages Bids/Responses Interested Vendors Print

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

Return To List Modify/Amend Archive Print

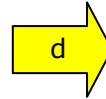
Notice Information

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

Location:

PROCUREMENT NOTICE INFO
Created: February 16, 2009 4
By: Micki Buyer
Modified: February 16, 2009 4
By: Micki Buyer

ELECTRONIC SUBMISSIONS
Doc Package
[CLIN](#)



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

Bid Mod Test 39 - MM-FBO-039

RETURN RETURN TO LIST (NOTICES)

Notice Information Packages Bids/Responses Interested Vendors

Keywords: Go

No items found

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

- 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.

Notice Information Packages Bids/Responses Interested Vendors

Keywords: Go

Batch Options Items 1-2 of 2

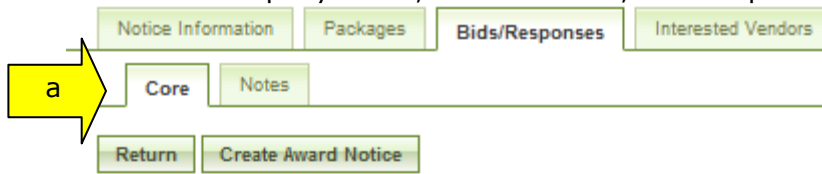
	Last Name	First Name	Contractor	DUNS	Type	Total Bid	Submitted On
	Vendor	Micki	FBO Test Vendor		CLIN, Doc Package	2,500.00	Feb 21, 2009 10:12 pm
	Vendor02	Micki	Test Vendor 2		CLIN, Doc Package	1,500.00	Feb 21, 2009 11:25 pm



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

- 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;



Response

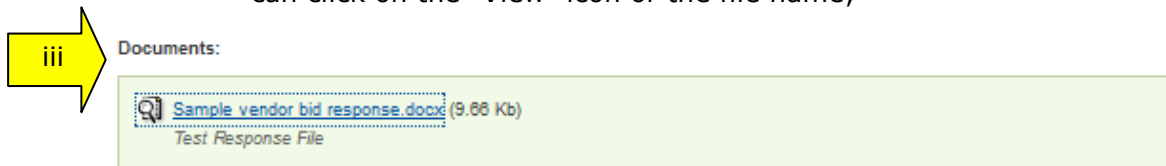


- ii. The CLIN template, if applicable, as completed and submitted by the vendor with a Unit Price and Total price (Quantity multiplied by the Unit Price) per line item, as well as a Grand Total price for all line items;

A screenshot of a table with four columns: 'Line Item Description', 'Quantity', 'Unit Price', and 'Total'. A yellow arrow labeled 'ii' points to the table. The table contains one line item and a grand total row.

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

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



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

RESPONSE INFO

Created: February 21, 2009 10:12 pm

By: [Micki Vendor](#)

Modified: February 21, 2009 10:38 pm

By: [Micki Vendor](#)

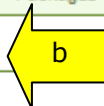


- b. The "Notes" sub-tab allows the user to enter and save notes for each electronic response submission:
 - i. If there are no notes saved, the system will indicate "No Items Found;"
 - ii. To create a note, click on the "Add New Note" button located at the bottom of the page;

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

Core **Notes**

Keywords:



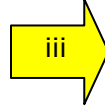
 No items found



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

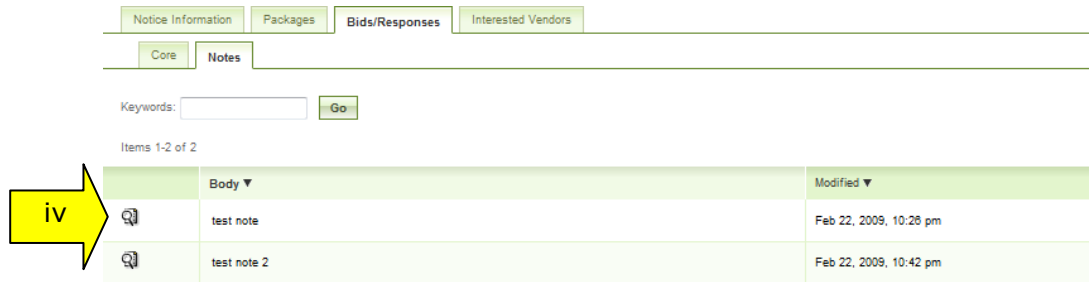
Notice Information Packages Bids/Responses Interested Vendors

Core **Notes**

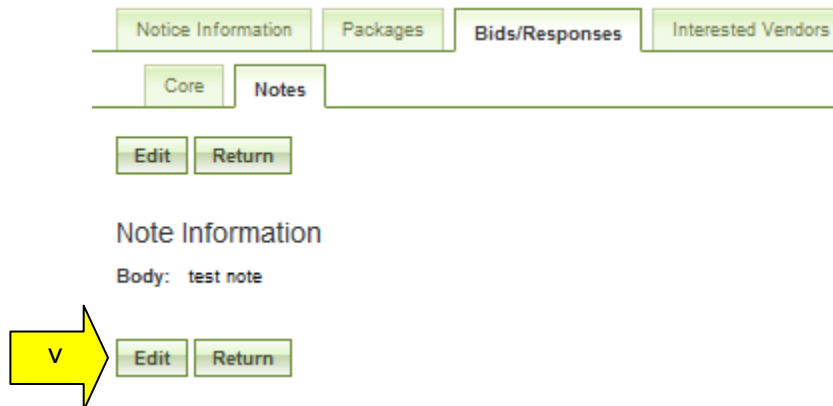
 **Note Information**

Body*:

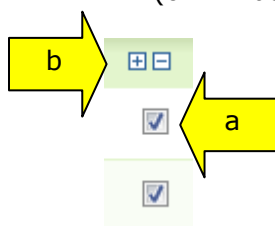
1. "Submit" saves the text entered and returns the user to the main "Notes" sub-tab listing all saved entries;
 2. "Save" saves the text entered and keeps the user within that particular note for review;
 3. "Return" does not save the text entered and returns the user to the main "Notes" sub-tab listing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



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




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



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

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

Keywords:

Batch Options  of 2

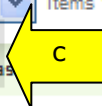
Download Zip
Mail

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

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

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

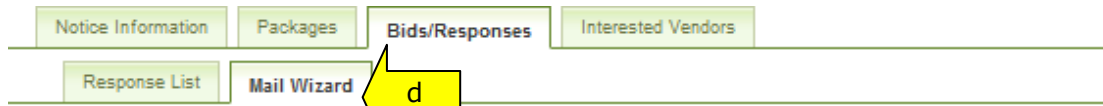
Keywords:

Batch Options  Items 1-2 of 2

Download Zip
Mail

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

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



STEP 1: Review/Edit Message
 Please review/set the parameters of the message you wish to send. Make any changes in the form below, select whether and how you wish to save these changes, and then select the 'next' button.

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

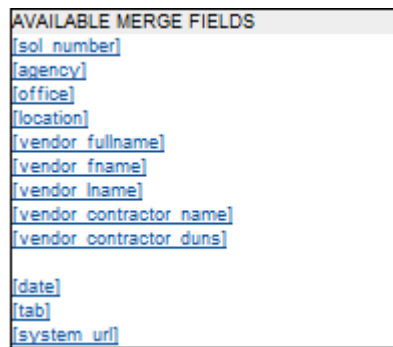
ii **From:**
 Please enter the e-mail address which will be used in the from field.

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

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

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

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




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

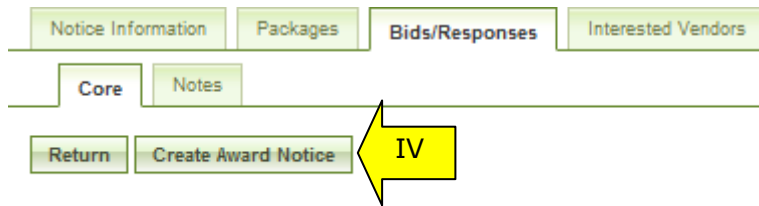
4. The user can attach more files using the "Add Additional Attachments" button;

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

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

5.5 Create Award

- I. From any page on the system, a user can go to upper navigation "Notices" button and then use the create award button to add an award to the notice. Look for:
 -  (see section 4.3.)
- II. Additionally, a user can use the quicklink "create award" on their "My FBO" page to modify / amend a notice.
- III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.
- IV. If the Bid Module is enabled for a user's notice and there are vendor electronic responses submitted, the user can also initiate the award process directly from the "Core" sub-tab of an electronic response by clicking on the "Create Award Notice" button. (Note, this button will only be present if the notice is eligible for award.)



Response

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

5.6 Cancel Notice

See section 4.4.

5.7 Deletion of Draft Notices

See section 4.5.

5.8 Archive Notices

See section 4.6.

5.9 Unarchive Notices

See section 4.7.

5.10 Print Notices

See section 4.8.

5.11 Review Interested Vendors List

See section 4.9.

6 Non-FBO Secure Document Link

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

6.1 Create Non-FBO Secure Document Link

- I. From procurement notices navigation, go to Non-FBO Solicitation sub-tab to see list of Non-FBO Solicitations.

- II. Red x in the released column indicates the Non-FBO solicitation is in draft format (not released yet). A date in this column, means the Non-FBO solicitation was released on this date.
- III. Click "Add New Non-FBO Solicitation" to create a new Non-FBO solicitation link.

The screenshot shows the FEDBizOpps.gov website interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 7:16 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for 'Switch Account' and 'Logout'. The main content area is titled 'Non-FBO Solicitations' and features a search bar with 'Keywords:' and buttons for 'More' and 'Go'. Below the search bar is a table of results for 'Items 1-4 of 4'. The table has four columns: 'Actions', 'Sol/Ref #', 'Created on', and 'Released'. The first row shows a red 'x' in the 'Released' column, while the other rows show dates. At the bottom of the table is a button labeled 'Add New Non-FBO Solicitation'. A yellow arrow labeled 'I' points to the 'Non-FBO Solicitations' tab, and another yellow arrow labeled 'III' points to the 'Add New Non-FBO Solicitation' button.

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

- I. 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: The solicitation # and archive date (not shown in image below) must be entered before the "save draft" button can be used to save the Non-FBO Solicitation in draft format.
- III. "Cancel" returns the user to the list of Non-FBO Solicitations (at bottom of form, not shown in screen shot).
- IV. "Proceed" takes the user to the next step in the process (at bottom of form, not shown in screen shot).

[New Non-FBO Solicitation]
[Return to Procurement Notices](#) | [Return to list \(nonfbo\)](#)

1 Details (highlighted with a yellow arrow)
2 Attach Packages
3 Review/Submit

Solicitation Details

Please enter the details for this non-fbo solicitation

Solicitation #*:
Enter the solicitation number

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

Select an Existing or New Contact:
New Contact

Title:

Full Name:
New Contact

Email:
Contact@new.com

Phone:

Fax:

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

[New Non-FBO Solicitation]
[Return to Procurement Notices](#) | [Return to list \(nonfbo\)](#)

- 1 Details
- 2
- 3 **Proceed & Review**

Attach Packages

* indicates a required field

Package #1

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

Create New Attach/Select Existing

PR #*:

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled?*

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

yes no

Explicit Access*:

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

yes no

Is CD Available*:

yes no

[Remove Package](#)

- 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.

[New Non-FBO Solicitation]
[Return to Procurement Notices](#) | [Return to list \(nonfbo\)](#)

1 Details
2 Attach Packages
3 Review/Submit

Solicitation Details

Solicitation #: Test00006

Primary Point of Contact:
New Contact
Contact@new.com

Archive Date:
August 4, 2010

Attach Packages

Package #1
PR #: TEST0113
Is this Export Controlled?: no
Explicit Access: no

[Three New FBO FAQs Jan2010.doc](#) (35.50 Kb)
Description: t

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

- I. The link for the Non-FBO solicitation is displayed in the "Details" sub-tab when viewing the Non-FBO Solicitation from the list of notices.
- II. Vendors must log in after clicking that link and will see the uploaded packages - and can request access etc., the same way they would for FBO Solicitations. Users will manage explicit access requests in the same way as described for FBO solicitations.

Non-FBO Solicitation: Test00006 [Return To Procurement](#)


Procurement Notices | Drafts | Archived | **Non-FBO Solicitations**

Details | Authorized Parties


[Unrelease Solicitation](#) | [Return](#) | [Archive](#)

Solicitation Details

Solicitation #: Test00006
Primary Point of Contact: New Contact
Contact@new.com
Archive Date: August 4, 2010
Vendor Link: <https://fbo-test.symplicity.com/fedteds/Test00006>



Attach Packages

 **Package #1**
PR #: TEST0113
Is this Export Controlled?: no
Explicit Access: no
Is CD Available: no

[Three New FBO FAQs Jan2010.doc \(35.50 Kb\)](#)
Description: t

[Unrelease Solicitation](#) | [Return](#) | [Archive](#)

6.2 Un-release Non-FBO Secure Document Link

- I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional and vendors trying to view the link of an unreleased Non-FBO solicitation will receive an error message.
- 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 "Procurement Notices" and the "Non-FBO Solicitations" sub-tab. Click on the review tab to open the previously released item.

Non-FBO Solicitations

Procurement Notices Drafts Archived **Non-FBO Solicitations**

Solicitations Archived

Keywords: [Less Search Fields](#)

Released Date: to Released: yes

Results: Items 1-1 of 1

Actions	Sol/Ref # ▼	Modified on ▼	Released ▼
	Test00006	Aug 01, 2010 9:39 pm	Aug 01, 2010

[New Non-FBO Solicitation](#) Items 1-1 of 1

III

- 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

Non-FBO Solicitation: Test00006 Return To Procurement

Procurement Notices Drafts Archived **Non-FBO Solicitations**

Details Authorized Parties

Unrelease Solicitation Return Archive

Solicitation Details

Solicitation #: Test00006
Primary Point of Contact: New Contact
Contact@new.com
Archive Date: August 4, 2010
Vendor Link: <https://fbo-test.symlicity.com/fedteds/Test00006>

Attach Packages

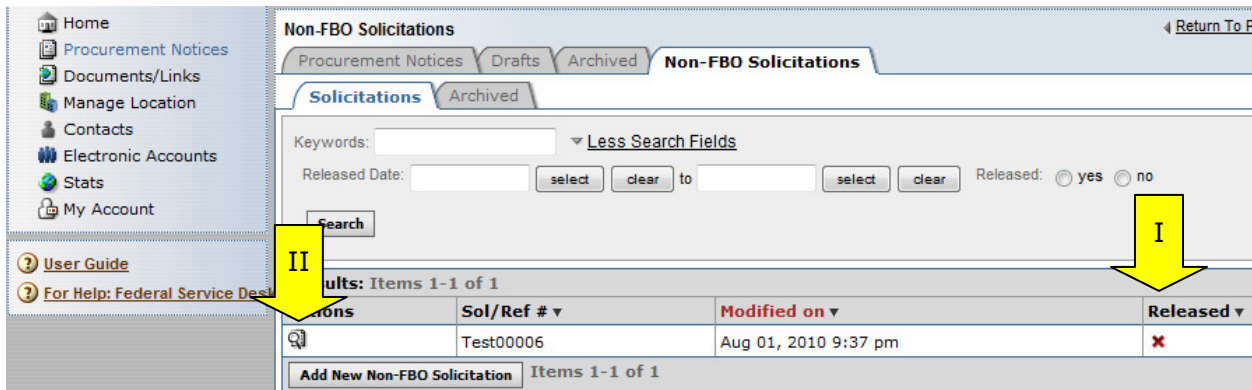
Package #1
PR #: TEST0113
Is this Export Controlled?: no
Explicit Access: no
Is CD Available: no

[Three New FBO FAQs Jan2010.doc \(35.50 Kb\)](#)
Description: t

Unrelease Solicitation Return Archive

6.3 Delete Draft Non-FBO Secure Document Link

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



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

Non-FBO Solicitation: Test00006
[Return to Procurement Notices](#) | [Return to list \(nonfbo\)](#)

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

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

Solicitation Details

Solicitation #:
Test00006

Primary Point of Contact:
 New Contact
Contact@new.com


Archive Date:
August 4, 2010

Attach Packages

Package #1

PR #: TEST0113
 Is this Export Controlled?: no
 Explicit Access: no

[Three New FBO FAQs Jan2010.doc](#) (35.50 Kb)
 Description: t



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

7 Manage Document Packages

(outside context of FBO Notice Creation)

7.1 Add New Document Package to Existing Notice

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

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

FEDBIZOPPS.GOV Federal Business Opportunities

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

Documents/Links

Packages Authorized Parties

Keywords: More Go Clear

Items 1-3 of 3

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

Download/View: [More docs.](#)

Download/View: [image file](#)

Download/View: [secure doc](#)

Add New Items 1-3 of 3

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

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

FEDBIZOPPS.GOV Federal Business Opportunities

Logout

Home
Procurement Notices
Documents/Links
Agencies
Organizations
Buyers
My Account

User Guide
Help Desk

[New Documents/Links]

1 Details Package Details * indicates a required field
Please enter the details for this document package

2 Upload Files

3 Review/Submit

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

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

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

Save Draft Quit Process And Return Proceed

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

[New Documents/Links]
[Return to Documents/Links](#) | [Return to list \(Documents/Links\)](#)

Files / Attachments

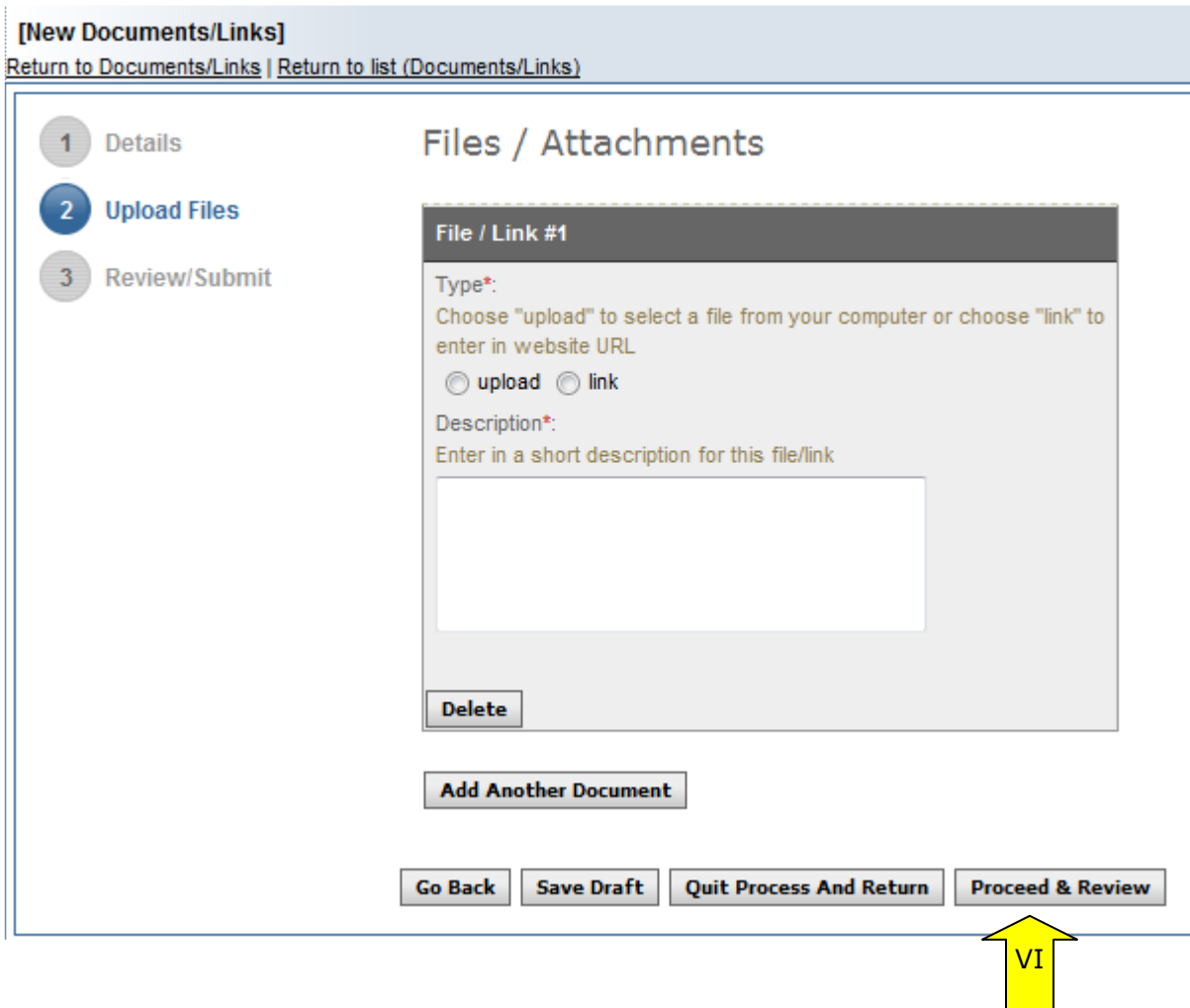
1 Details
2 **Upload Files**
3 Review/Submit

File / Link #1

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

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

VI



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

[New Documents/Links]
[Return to Documents/Links](#) | [Return to list \(Documents/Links\)](#)

- 1 Details
- 2 Upload Files
- 3 Review/Submit**

Package Details

Is this a secure/sensitive package?:
no

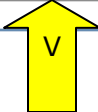
Sol/Ref #:
MM-FBO-029 (Combined Synopsis/Solicitation)

Type:
Mod/Amendment

Files / Attachments

<http://www.google.com>
Description: Test URL

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



7.2 Edit Document Package

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

Documents/Links Return To Documents/Links

Packages Archived Authorized Parties

Keywords: [More Search Fields](#)

Items 1-20 of 36 Jump 1 | Next >

Label / PR #	Type	Solicitation	Created on	Posted On
12345678912	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Jul 30, 2010 4:37 pm	Jul 30, 2010
Amendment 1	Mod/Amendment	[Unassigned]	May 04, 2009 10:21 pm	May 04, 2009
Amendment 1	Mod/Amendment	army-tdp-test	Apr 14, 2009 10:53 am	Apr 14, 2009

Mod/Amendment (Draft)

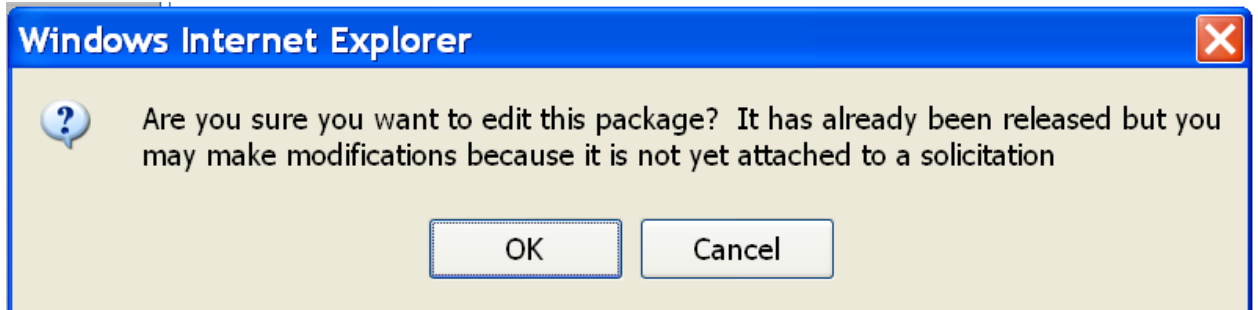
Details Audit Trail

Note:
This is a controlled unclassified document package.

Is this a secure/sensitive package?: yes
 Is the related solicitation on FBO: no
 Solicitation: -
 Label: Mod/Amendment (Draft)
 PR #: 12345678912
 Is this Export Controlled?: no
 Explicit Access: no
 Is CD Available: no

[Notice to Offerors.doc \(23.50 Kb\)](#)
 Description: test

- I. After edit is selected, user sees 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 document package creation.

7.3 Delete Document Package

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

Label / PR #	Type	Solicitation	Created on	Posted On
12345678912	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Jul 30, 2010 4:37 pm	Jul 30, 2010
Amendment 1	Mod/Amendment	[Unassigned]	May 04, 2009 10:21 pm	May 04, 2009
Amendment 1	Mod/Amendment	army-tdp-test	Apr 14, 2009 10:53 am	Apr 14, 2009

Mod/Amendment (Draft)

Details | Audit Trail

Note:
This is a controlled unclassified document package.

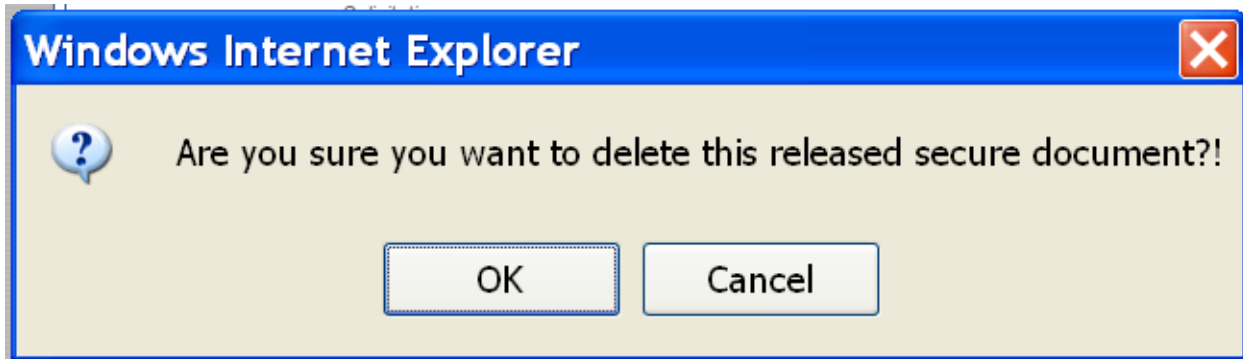
Return | **Delete** | Edit

Is this a core/sensitive package?: yes
 Is the linked solicitation on FBO: no
 Solicitation: -
 Label: Mod/Amendment (Draft)
 PR #: 12345678912
 Is this Export Controlled?: no
 Explicit Access: no
 Is CD Available: no

[Notice to Offerors.doc](#) (23.50 Kb)
 Description: test

Return | Delete | Edit

- I. After delete is selected, user sees message asking for confirmation that they desire to delete the package.



7.4 Manage Explicit Access Requests

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

The screenshot displays the FEDBIZOPPS.GOV website interface. The header includes the logo and the text "Federal Business Opportunities". A left-hand navigation menu lists various options such as Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. Below this menu are links for "User Guide" and "For Help: Federal Service Desk". The main content area is titled "Home" and features several sections: "Video Demonstrations" with a "NEW" badge and a note about the Adobe Flash plugin; "Managing Buyers & Locations"; "Pending Actions" which contains a list with "0 Explicit Access Requests" and "0 Agency Contact Registrations"; "Quicklinks" with options like "Create Notice", "Mod/Amend Notice", "Create Award", "Cancel Notice", and "Upload New Documents/Links"; "Statistics" showing counts for Active and Archived Procurement Notices, Active and Archived Non-FBO Solicitations, Active Document Packages, and Agency Users; and "Announcements" which states "There are no announcements at this time." A yellow arrow with the letter "I" points to the "Explicit Access Requests" link in the Pending Actions section.

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

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, it displays the date and time (Thursday, April 17, 2008 | 6:18 pm) and the user information (User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY). The main navigation menu includes Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, and My Account. The current page is titled "test414" and is under the "Authorized Parties" section. There are three sub-tabs: "Pending Requests", "Authorized", and "Rejected Requests". A search bar with a "Go" button is present. Below the search bar, a table displays the results for "Items 1-2 of 2". A yellow arrow points to the review icon in the "Actions" column of the first row.

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

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

The screenshot displays the 'Approve/Reject Request' page on the FEDBIZOPPS.GOV website. The page title is 'Approve/Reject Request' and the user is identified as 'nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY'. The page is divided into several sections:

- Navigation Menu (Left):** Includes links for Home, Procurement Notices, Documents/Links, Agencies, Organizations, Buyers, My Account, User Guide, and Help Desk.
- Header:** Shows the date 'Thursday, April 17, 2008 | 6:19 pm' and the user's name and agency.
- Main Content Area:**
 - Approve/Reject Request:** Contains a note: 'Note: You may approve or reject this vendor's request for explicit access to sensitive documents. Note: Approving this vendor will add them to the Authorized Party List for this solicitation.' Below the note are three buttons: 'Approve', 'Reject', and 'Quit Process And Return'.
 - Pending Explicit Access Request:** Shows the request details:
 - Status: pending
 - the Notice on FBO: yes
 - Solicitation #: 12344888k
 - Vendor:

Contractor:
DUNS #: 001002138
Name: OPTOMETRICS CORPORATION
Cage #: 1X8K5
Fullname: Nancy Selina Pettit
First Name: Nancy
Middle Name: Selina
Last Name: Pettit
- Authorized Vendors Info (Right):** A table showing vendor information:

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

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

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

FEDBIZOPPS.GOV Federal Business Opportunities

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

Reject Request | Packages | Authorized Parties

Note: Please add a reason for rejection

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

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

Status: rejected

Is the Notice on FBO: **Yes**

Solicitation #: 12344888k

Vendor: Nancy Selina Pettit (Vendor Associates: 147852963)

Rejection Note*: Please provide a reason for this rejection

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

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

7.5 Review Authorized / Rejected Explicit Access Requests

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

The screenshot shows the FEDBIZOPPS.GOV website interface. A yellow arrow labeled 'I' points to the 'Authorized Parties' sub-tab. The page displays a table of authorized parties with the following data:

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

Below the table, there is an 'Add Authorized Party' button and a link to 'Items 1-3 of 3'.

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

The screenshot shows the FBO website interface. The top navigation bar includes the FBO logo and 'Federal Business Opportunities'. The left sidebar contains a navigation menu with 'Documents/Links' highlighted. The main content area is titled 'Documents/Links' and features a search bar and a table of items. The table has columns for 'Label / PR #', 'Type', 'Solicitation', 'Created on', and 'Posted On'. The first row shows a package with label '8912' and type 'Other (Draft RFPs/RFIs, Responses to Questions, etc..)'. The second row shows 'Amendment 1' with type 'Mod/Amendment'. A yellow arrow labeled 'II' points to the 'Amendment 1' link in the table.

Label / PR #	Type	Solicitation	Created on	Posted On
8912	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Jul 30, 2010 4:37 pm	Jul 30, 2010
Amendment 1	Mod/Amendment	[Unassigned]	May 04, 2009 10:21 pm	May 04, 2009

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

The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes the site logo, user information (Tuesday, April 15, 2008 | 6:05 pm | User: nancy agency - WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY), and links for Switch Account and Logout. The main content area is titled "Audit Trail - PR # 123456: 123456456" and features a search bar and a table of audit trail items. A yellow arrow labeled "III" points to a magnifying glass icon in the "Actions" column of the table.

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

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

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

FEDBIZOPPS.GOV [FBO](#) [108](#)

[Home](#) [Procurement Notices](#) [Documents/Links](#) [Agencies](#) [Organizations](#) [Buyers](#) [My Account](#)

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

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

Secure Package Log

PR #: 123456
 Sol/Ref #: 123456456
 Filename: fbo buyer guide1.pdf
 Vendor:

Contractor: DUNS #: 123456789 Name: Dagostin Incorporated Doing Business As (DBA): Doing Cage #: 12312323
Fullname: tony wetzler Email: twetzler@svmpolicity.com Phone: 5555555555

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

Secure Document Log Info

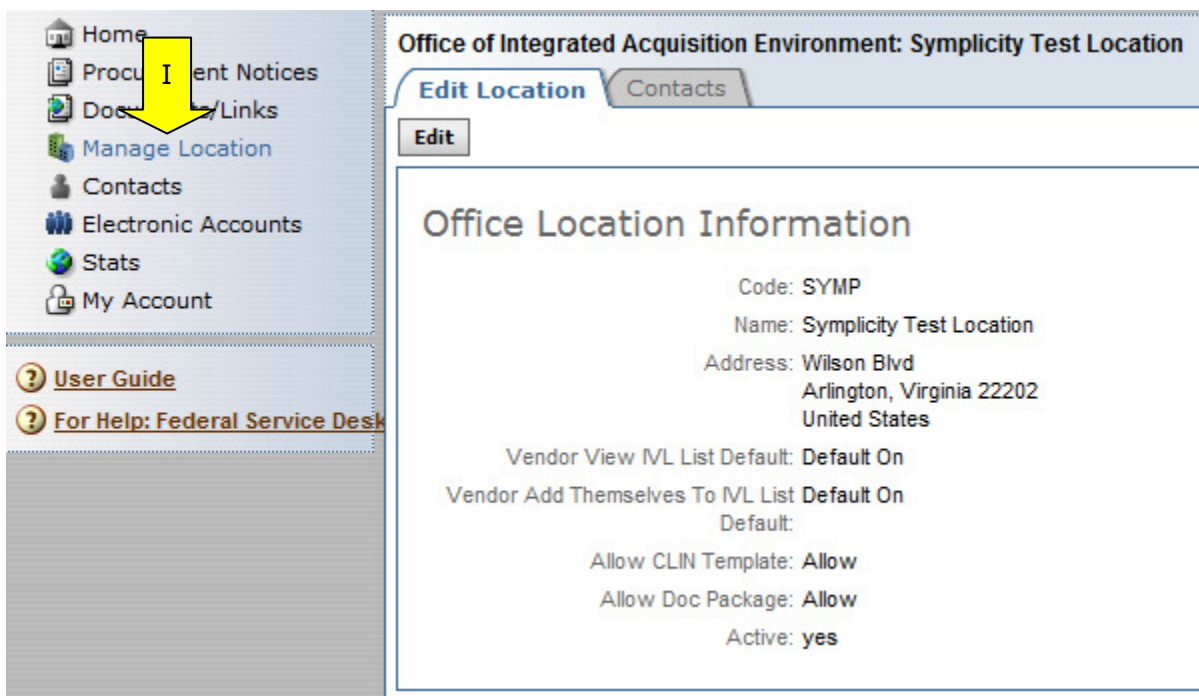
Created:	March 25, 2008 10:11 am
By:	tony wetzler
Modified:	March 25, 2008 10:11 am
By:	tony wetzler

[Return](#)

8 Manage Location

8.1 Edit Location Profile

- I. As previously indicated, the user can review their office location profile by going to the "Manage Location" main navigation.



Edit Office Location Information

- I. Click the "Edit" button which opens the record for edits.
- II. "Submit" enters the data for the record and submits the user's changes (returns user to the previous list).
- IV. "Save" enters the data for the record and keeps the user in the record.
- V. "Return", takes the user back to the prior screen without making any changes since the record was last saved.

Office of Integrated Acquisition Environment: Symplicity Test Location

Edit Location | Contacts

Edit

Office Location Information

Code: SYMP
 Name: Symplicity Test Location
 Address: Wilson Blvd
 Arlington, Virginia 22202
 United States

Vendor View IVL List Default: Default On
 Vendor Add Themselves To IVL List Default On
 Default:

Allow CLIN Template: Allow
 Allow Doc Package: Allow
 Active: yes

Office of Integrated Acquisition Environment: Symplicity Test Location

Location | Contacts

Save | **Return**

Office Location Information

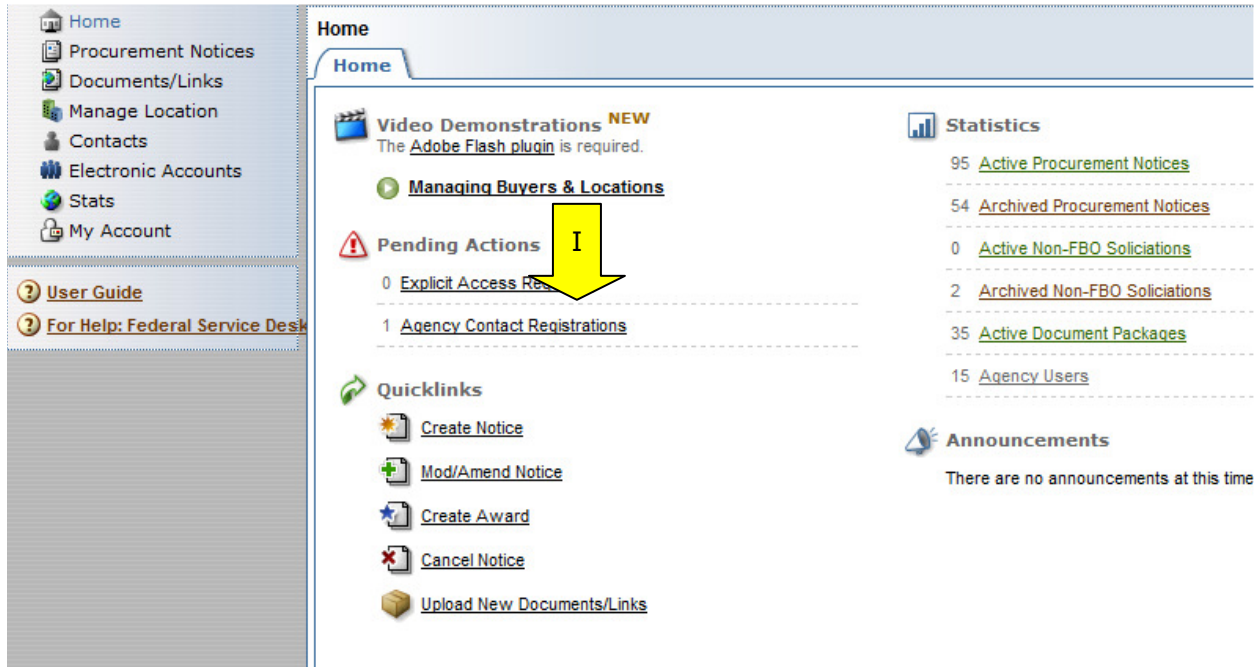
Code*: SYMP
 Name*: Symplicity Test Location

Address*:
 Street:
 Wilson Blvd
 City:
 Arlington
 State:
 Virginia
 Zip:
 22202
 Country:
 United States

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

8.2 Manage Agency User Accounts

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



8.2.1 Approving Email Verified New Registrations

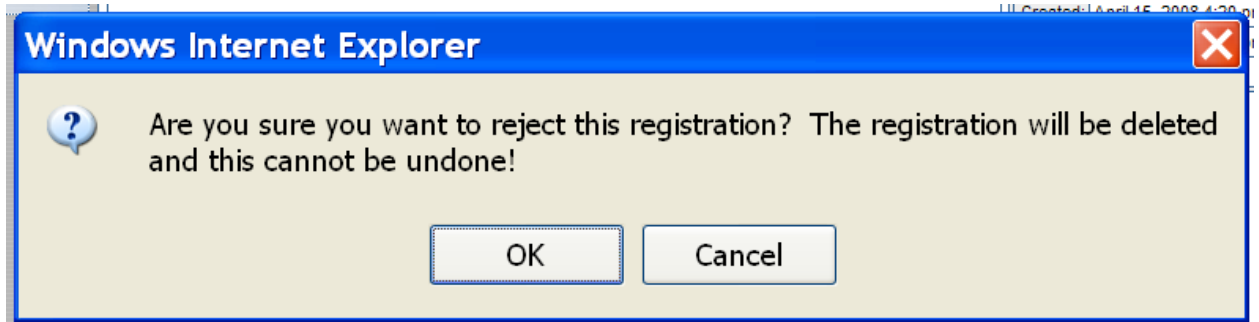
- I. All registrants will receive an e-mail after submitting a registration form which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail (they have to verify their email address).
- II. When the "new registrations" list is opened, users will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

The screenshot shows the 'New Registrations' page. At the top, there are tabs for 'Buyers List' and 'New Registrations'. Below the tabs is a search area with a 'Keywords' field, a 'Less Search Fields' dropdown, and radio buttons for 'Registration Verified' (yes/no). There are 'Search' and 'Clear' buttons. Below the search area is a table of results. A yellow arrow labeled 'I' points to the 'New Registrations' tab, and another yellow arrow labeled 'II' points to the search filters and the table.

Results: Items 1-1 of 1							
Actions	Last Name ▾	First Name ▾	Email	Agency ▾	User Level ▾	Role(s)	Verified ▾
	Request	Test	test233@noemail.gov	Office of Integrated Acquisition Environment	contracting office (Symplicity Test Location)	Buyer, Engineer	✓

Items 1-1 of 1

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



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

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

- Buttons at the top: **Approve Registration**, **Reject**, **Edit**, **Return To List**
- Agency Registration Info table:

Created:	April 15, 2008 4:20 pm
Modified:	April 15, 2008 4:24 pm
By:	Admin Test
- Fullname: nancy engineer metro
- Title: test
- Email Address: nsp@oneagency.com
- Account Info:

Agency:	WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
User Level:	agency
User Roles:	Buyer
- Username: testnancy
- Buttons at the bottom: **Approve Registration**, **Reject**, **Edit**, **Return To List**

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

Test Request (Office of Integrated Acquisition Environment) Re

Buyer List **New Registrations**

Save Changes Cancel Edits Cancel * indicates a required field

Buyer User Registration Form

Fullname*:
 Suffix:
 Title:
 Email Address*:
 Phone*:

Account Info:

Agency:
GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment

User Level:
contracting office

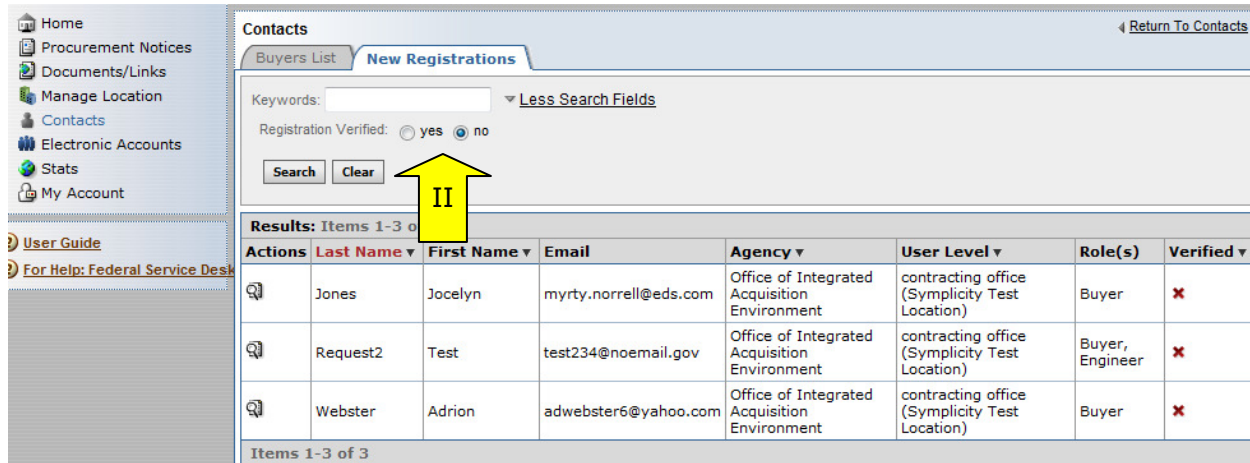
Contracting Office:
Simplicity Test Location

User Roles*:
 Buyer Buyer (Limited) Engineer Office Location Administrator

Username*:

8.2.2 Approving Email Un-verified New Registrations

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



The screenshot shows the 'New Registrations' section of the system. The search filter is set to 'Registration Verified: no'. A yellow arrow labeled 'II' points to the 'no' radio button. Below the filter is a table of three unverified registrations, each with a red 'x' in the 'Verified' column.

Actions	Last Name	First Name	Email	Agency	User Level	Role(s)	Verified
	Jones	Jocelyn	myrty.norrell@eds.com	Office of Integrated Acquisition Environment	contracting office (Simplicity Test Location)	Buyer	✘
	Request2	Test	test234@noemail.gov	Office of Integrated Acquisition Environment	contracting office (Simplicity Test Location)	Buyer, Engineer	✘
	Webster	Adrion	adwebster6@yahoo.com	Office of Integrated Acquisition Environment	contracting office (Simplicity Test Location)	Buyer	✘

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

8.2.3 Create an Agency Account

- I. To create a new user account, go to main navigation "Contacts."
- II. Use the "Create New Agency User" button to create a new agency user.
- III. See "Electronic Accounts" for information on creating email/ftp accounts in the system.

The screenshot shows the 'Contacts' page with a 'Buyers List' tab. The left navigation menu includes 'Home', 'Procurement Notices', 'Documents/Links', 'Manage Location', 'Contacts', 'Electronic Accounts', 'System', and 'My Account'. A yellow arrow labeled 'III' points to 'Electronic Accounts'. The main content area shows a search bar and a table of users.

Batch Options	Results: Items 1-15 of 15				
Actions	Last Name	First Name	Agency/Office	Location(s)	
<input type="checkbox"/> [Icons]	<u>Buyer</u>	<u>Micki</u>	GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment	Symplicity Test Location	
<input type="checkbox"/> [Icons]	<u>BuyerEngineer</u>	<u>Micki</u>	GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment	Symplicity Test Location	

This is a close-up of the table from the previous screenshot, focusing on the bottom row and the button below it. A yellow arrow labeled 'II' points to the 'Create New Agency User' button.

<input type="checkbox"/> [Icons]	<u>Talley1</u>	<u>Ashley</u>	GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment	Symplicity Test Location
----------------------------------	----------------	---------------	--	--------------------------

Create New Agency User Items 1-15 of 15

I.



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

The screenshot shows a web interface for creating a new agency user. On the left is a navigation menu with items like Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. Below the menu are links for 'User Guide' and 'For Help: Federal Service Desk'. The main content area is titled '[New Agency User]' and has a 'Core' tab. A yellow note box with a downward arrow labeled 'III' contains the text: 'Note: Please enter in the contact information and click [next] to proceed to the next step'. Below the note are 'Next' and 'Return' buttons. The form section is titled 'Agency User Information' and contains several input fields: Title, Full Name* (with an asterisk), First Name, Middle Name, Last Name, Suffix, Email* (with an asterisk), Phone, Cell Phone, and Fax. At the bottom of the form is a checkbox labeled 'Electronic Submission Account' with the text 'Set this to "yes" if this account is only used for electronic su this user only show up in the Electronic Accounts section.' and a 'no' option. A yellow upward arrow labeled 'II' points to the 'no' option.

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

[New User Account For Full Name] [Return To Contacts](#) | [Return To List \(Account\)](#)

Accounts

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

Next **Cancel** * indicates a required field

Agency: Office of Integrated Acquisition Environment
 User Level: Choose "agency" for agency administrators or for users that will manage data across offices/locations from their agency and below contracting office
 Contracting Office Location: Symplicity Test Location
 User Roles*: Buyer Buyer (Limited) Engineer Office Location Administrator

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

Full Name: Account [Return](#)

Core Accounts **Username/Password** Login As

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

Save **Return** * indicates a required field

Account Information

Disable Account: yes no
 Username*:
 Enter New Password:
 Verify Password:

8.2.4 Electronic Accounts

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

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

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Electronic Submission Accounts

Keywords: [More Search Fields](#)

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

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

[Item](#)

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

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Core

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

* indicates a required field

Agency User Information

Title:

Full Name*:

First Name:

Middle Name:

Last Name:

Suffix:

Email*:

Phone:

Cell Phone:

Fax:

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

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

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

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

8.3 Batch Options

8.3.1 Email Users

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

The screenshot shows the 'Buyers List' interface. On the left is a navigation menu with items like Home, Procurement Notices, Documents/Links, Manage Location, Contacts, Electronic Accounts, Stats, and My Account. The main area has a search bar with 'test' and a 'Batch Options' dropdown. Below is a table with columns: Actions, Last Name, First Name, Agency/Office, and Location(s). Two rows are selected, both for 'Buyer' and 'BuyerEngineer' at 'Symplicity Test Location'. A yellow arrow labeled 'II' points to the selection checkboxes in the 'Actions' column.

Actions	Last Name	First Name	Agency/Office	Location(s)
<input checked="" type="checkbox"/>	Buyer	Micki	GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment	Symplicity Test Location
<input checked="" type="checkbox"/>	BuyerEngineer	Micki	GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment	Symplicity Test Location

This screenshot shows the 'Batch Options' dropdown menu open. The menu includes options like 'Mail' and '[new message]'. A yellow arrow labeled 'IV' points to the '[new message]' option. The background shows the same table as the previous screenshot, with the two items still selected.

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

[Return To Contacts](#)

Members List New Registrations **Mail Wizard**

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

V Message Identifier: Please enter an identifier for this message

Subject*: Enter the subject of the email message.

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

Cc: Address(es) who should be carbon copied

Bcc: Address(es) who should be blind copied

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

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

Message Options
 Do Not Save
 Save as New

AVAILABLE MERGE FIELDS
[\[title\]](#)
[\[fullname\]](#)
[\[email\]](#)
[\[phone\]](#)
[\[fax\]](#)
[\[cell_phone\]](#)
[\[modified\]](#)
[\[created\]](#)
[\[username\]](#)
[\[electronic_acct\]](#)
[\[password\]](#)

[\[date\]](#)
[\[tab\]](#)
[\[system_url\]](#)

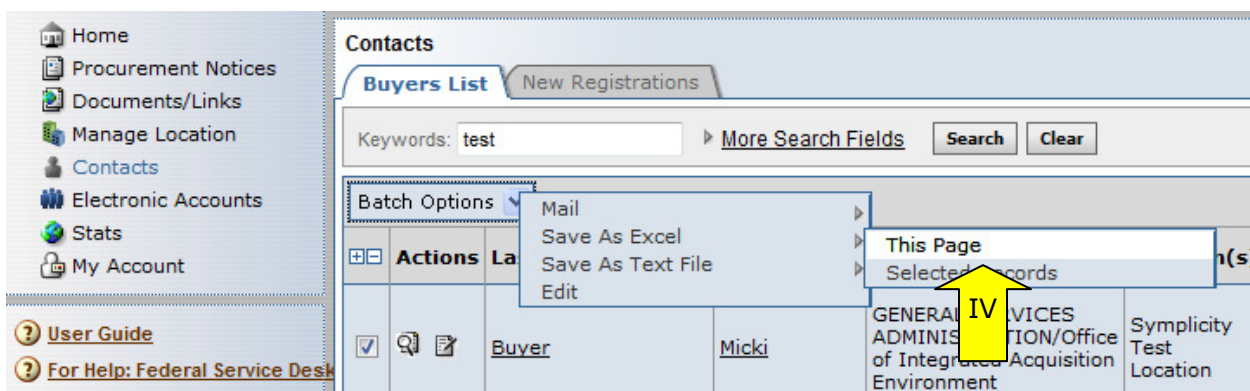
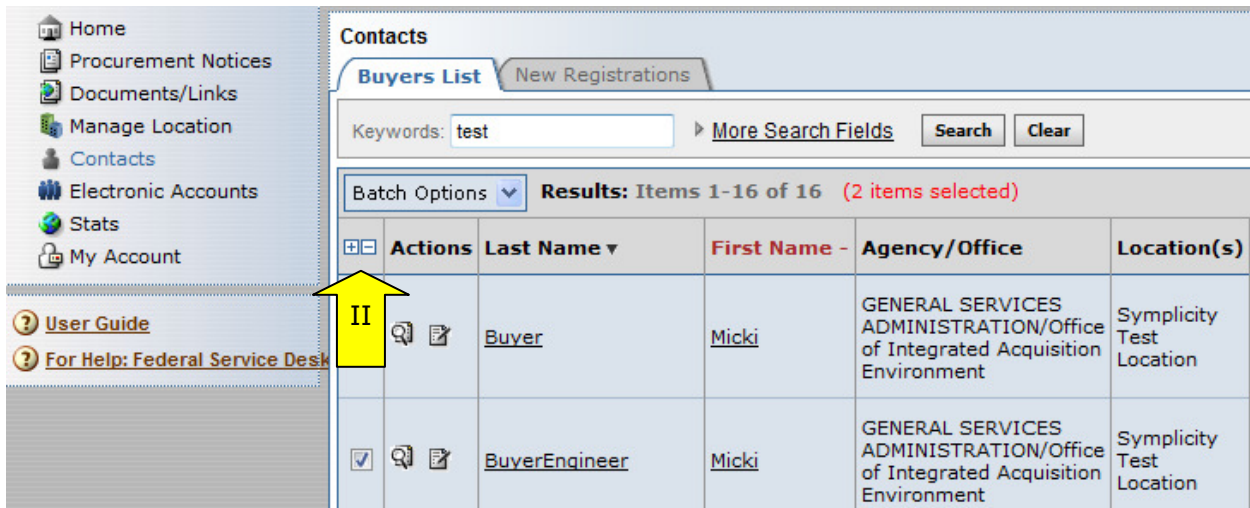
- I. Next the user will be given a chance to review the list of recipients for the message.
- II. "Prev" returns the user to the message composition step of the process.
- III. "Cancel" cancels the operation. Note, batch selections are not cleared with cancel.
- IV. "Send Message" sends the message to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

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



8.3.2 "Save to Excel"

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

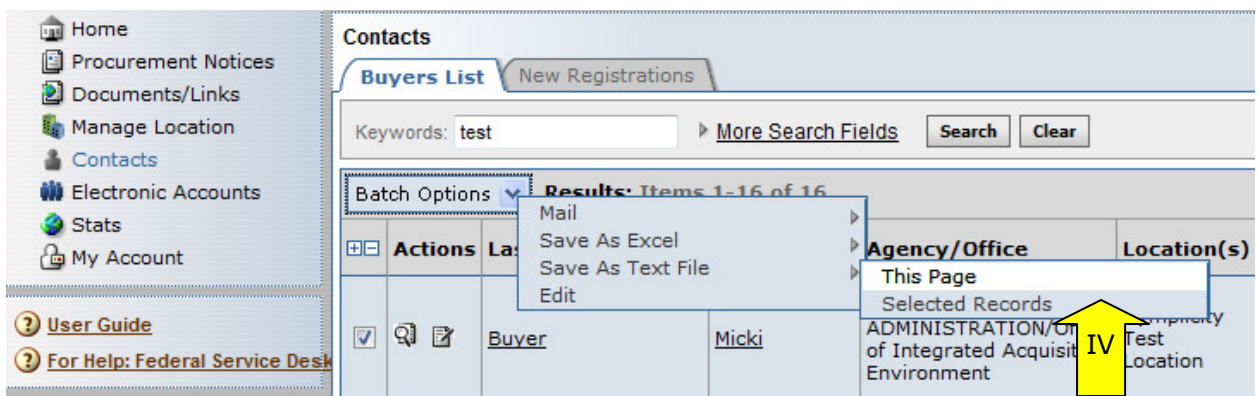


- IV. Follow your browser prompts to open or save as excel file.
- V. System will create excel file with select fields for the buyer accounts selected.

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

8.3.3 "Save to Text File"

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

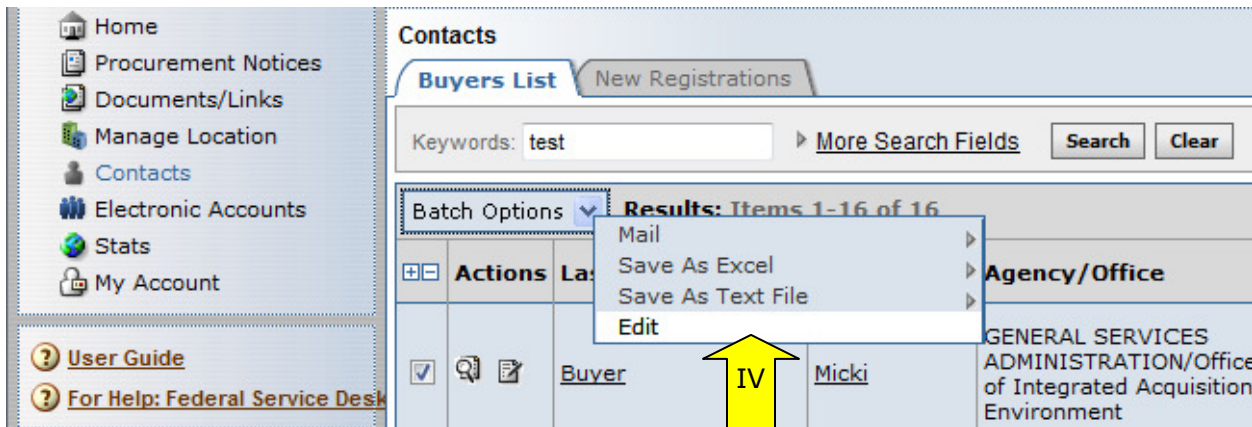
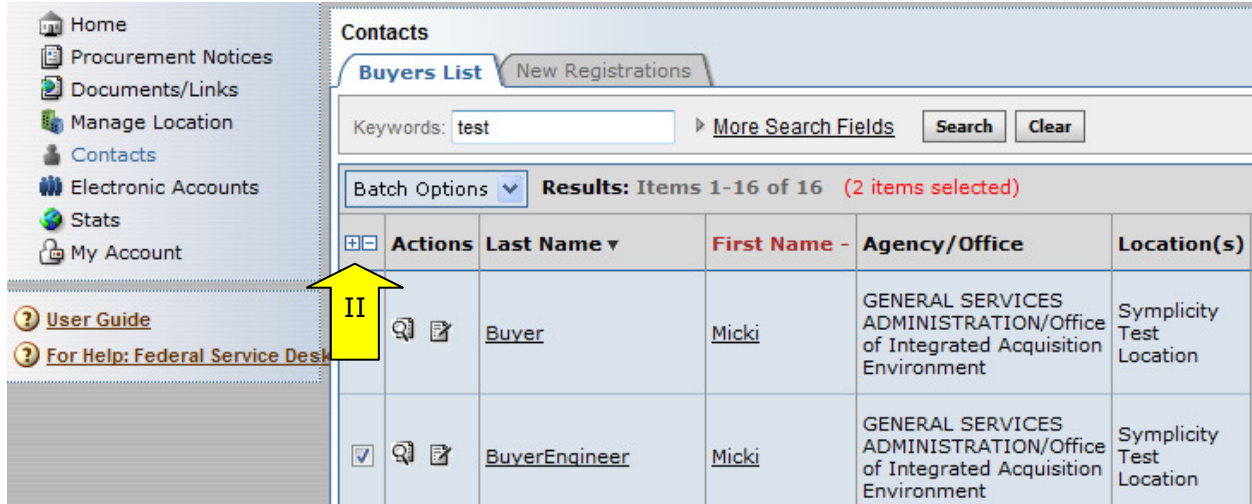


- VI. Follow your browser prompts to open or save the text file.
- VII. System will create text file with select fields for the buyer accounts selected.

8.3.4 Edit "Roles"

- I. From the Contacts or Electronic List of accounts, the user can edit user "roles".
- II. Open the buyers list, and use the "+" selection tool to select all buyers for inclusion in the role edit. The "-" will deselect all in the list.

- III. If not all are to be edited, use the checkmark to select specific users.
- IV. Once selections have been made, select the "batch options" tool, and the "edit" option.
- V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the "-" tool to deselect all if you wish to do another batch operation that targets a different list of users.




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

FED Batch Edit ✖

NOTE: Be very careful using this feature - All current values will be overwritten with the new values. If editing a field that accepts multiple values, all existing values will be replaced.

** indicates a required field*



IV

Proxy Host:

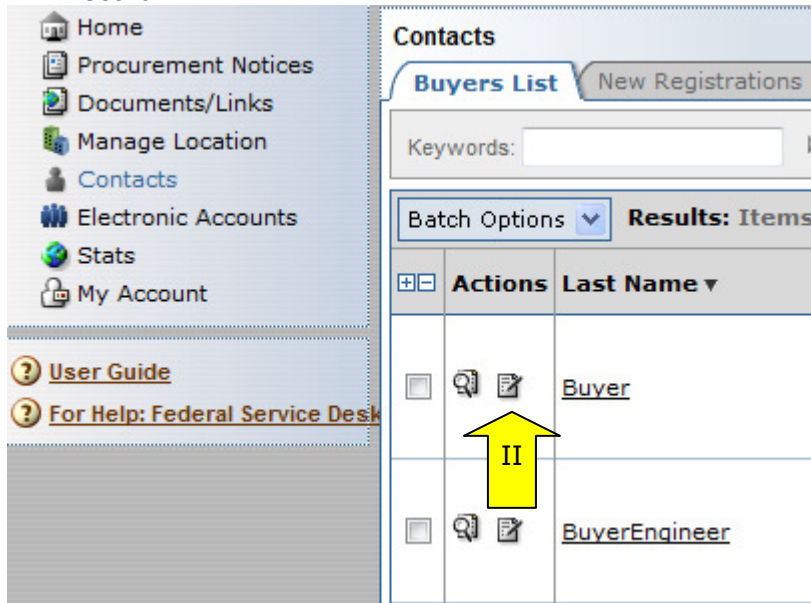
Proxy Port:

User Roles:

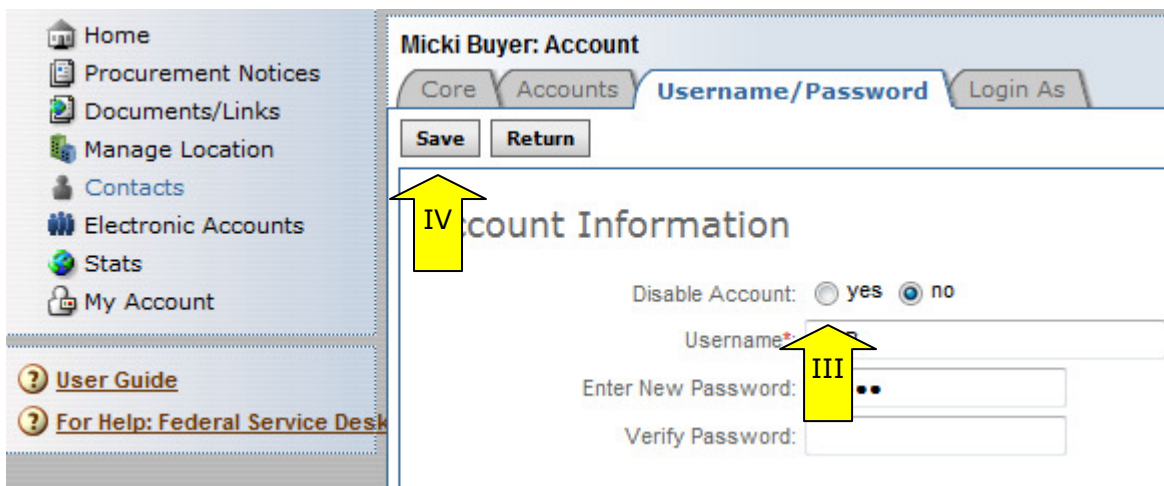
- Agency Administrator
- Buyer
- Buyer (Limited)
- Engineer
- Office Location Administrator
- Super User

8.4 Disabling an Account


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



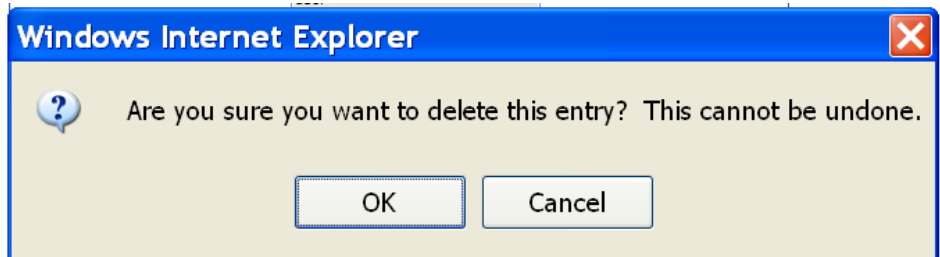
- III. Go to the Username / Password tab and change the field "disabled account" from "no" to "yes" to disable the account.
- IV. Select "save" to save the disabled status for the user in the system.
- V. "Return" quits the process without saving changes to the record.



8.5 Delete an Account

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

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



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

