FBO.GOV Vendor Guide 1.6

Updated: 7/30/2010

Table of Contents:

1 System Overview 3
1.1 Definition of key terms 5
2 Logging onto the System 9
2.1 System URL 9
2.2 Navigation Bar on Logon Page – Unsecured features 9
2.3 Register for an Account 10
2.4 Returning Users – Log into the system 15
2.5 Captcha Security 16
2.6 FBO Terms and Conditions 17
3 Vendor Interface 18
3.1 “session time out” 18
3.2 Top of Page Navigation 18
3.3 My FBO 19
3.4 My Profile 20
3.5 Opportunities 24
3.6 Agencies 25
4 Vendor Opportunity Actions 29
4.1 Reviewing an Opportunity 29
4.2 Printing an Opportunity 32
4.3 Managing Electronic Responses to an Opportunity 34
4.3.1 Submitting an Electronic Response 34
4.3.2 Reviewing / Editing an Electronic Response 38
4.4 Reviewing Packages associated with an Opportunity 40
4.5 View Controlled, Unclassified Document 42
4.6 Request Explicit Access to View a Document 43
4.7 Viewing Export Controlled Documents 45
4.8 Explicit Access and Export Controlled Documents 48
4.9 Interested Vendor List 50
4.10 Search Agents 53
4.10.1 Creating a Search Agent from “Search Agents” 54
4.10.2 Creating a Search Agent from an Advanced Search 57
4.10.3 Search Agent Emails 61
4.11 Search Field Tips 62
4.12 Watched List 65

1 System Overview

The system is a web-based portal which allows vendors to review Federal Business Opportunities (FedBizOpps).

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

Key Vendor Capabilities: Using secured accounts (password protected), vendors are able to take advantage of key system functionality as outlined below:

Vendor Profile: Vendors maintain account profiles in the system. Having a profile in place streamlines use of the portal. Among other profile elements, the following key vendor information is maintained in their profile:

1. DUNS (Data Universal Numbering System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central Contractor Registration) prior to the award of a contract; basic agreement, basic ordering agreement, or blanket purchase agreement. According to FAR 52.204-7, to register in CCR, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
2. 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. The code may be used for Facility Clearance, Pre-Award survey, automated Bidders Lists, pay processes, source of supply, etc.
3. MPIN (Marketing Partner Identification Number) – Optional profile field required to view sensitive materials.

Vendor Opportunity Review Features:

- Vendors can search for opportunities based on the following elements:
    - Keyword/Solicitation#
    - Opportunity/Procurement Type
    - Posted Date
    - Response Deadline
    - Last Modified Date
    - Contract Award Date
    - Place of Performance State
    - Place of Performance Zip Code
    - Set-aside code ("set-aside" solicitations allow only specified business concerns)
    - Classification code
    - NAICS (North American Industry Classification System) code
    - Agency/Office location(s)
    - Recovery and Reinvestment Act Action

    - Active vs. Archived Status
    - J&A Statutory Authority (Justification & Approval)
- Vendors can set up "search agents" based on detailed search elements that highlight newly added opportunities aligning with their search criteria.
- Vendors can add opportunities to a "watched list" list (a la "favorites" list). This allows for ease in referencing targeted opportunities. Additionally, vendors receive updates about opportunities on their Watched List.
- Per the vendor's profile status, vendor can review documents associated with the opportunity (Packages).

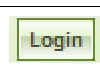
<u>Vendor Opportunity Actions:</u>
- Vendor is able to add themselves to the "interested vendors list" for an opportunity.
- If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review vendors who have expressed interest in the opportunity.

Key Buyer Capabilities: Using secured accounts (password protected), buyers are able to take advantage of key system functionality as outlined below:
- Maintain Buyer Profile
- Create, Modify/Amend, or Cancel an Opportunity Notice
- Manage document package content, and vendor accessibility to package documents, that support opportunities.
- Create an Award

1.1 Definition of key terms

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

Term	Icon	Description
Accessibility	Accessibility or Accessibility: ON	Accessibility Mode – Disables select interface enhancements to ensure users of assistive technologies have full and equal access to all aspects of this web site. Icon is "red" if accessibility mode is on or "blue" if accessibility mode is off.
Active Notice	n/a	Notice that is open for vendor review/response.
Archived Notice	n/a	Notice that is viewable for archival purposes only.
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's 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/Responses	n/a	If enabled by the Buyer, this feature allows for the submission of electronic responses to opportunities until the responses deadline has passed. Note: Vendors must login to be able to submit/review electronic responses.
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	Cancel	The "Cancel" button returns the user to the previous page, without updating any record fields.
Clear	Clear	The "Clear" button appears when a user is using search filters. If selected, the system "clears" any previously entered search filters.

Document	n/a	"Document" is a single attachment (either link or uploaded document) that can be attached to a "Notice". A collection of documents can be bundled to create a "Package"
DUNS	n/a	DUNS (Data Universal Numbering System) Number - According to the FAR 4.11, prospective vendors must be registered in CCR (Central Contractor Registration) prior to the award of a contract; basic agreement, basic ordering agreement, or blanket purchase agreement. According to FAR 52.204-7, to register in CCR, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
Electronic Response / Submission	n/a	If the "Bids/Responses" feature is enabled by the Buyer for an opportunity, a vendor can submit an electronic response which can be in the form of a Line Item Builder template and/or a document upload; the Buyer determines the type of electronic response submission that is available to the vendor. Vendors must login to be able to submit/review electronic responses.
Explicit Access	n/a	Vendor is given explicit access to review controlled, unclassified document(s) or package(s). A government user can pre-select a vendor user for access, or a vendor user can request and be granted access.
Export Controlled	n/a	Export Controlled requires that the vendor's company be certified by the Defense Logistics Information Service's Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application. FBO 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.
Help	 or 	Throughout the system, the system presents users with the opportunity to review system "Help" messages. The icons presented here will take the users to the help message that is available.
Interested Vendor	n/a	If a notice is set to allow for either of these features (note the features are set by the buyer), vendors will be allowed to do the following: 1) indicate interest in a particular notice, 2) review the listing of interested vendors for a notice (i.e., potential list of targets for potential collaboration).
Log-in		Use username and password to logon to an account on the system

Logout	Logout	The "Logout" button can be used to log the user off the system.
MPIN	n/a	Marketing Partner Identification Number. Export Controlled access level requires that the vendor's company (MPIN) be certified by the Defense Logistics Information Service's Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application.
Package		Collection of "documents" that can be attached to a "notice".
Proceed	Proceed	The "Proceed" button saves the entered data on a form and takes the user to the next step (first prompting users to complete required fields on the form).
Quicklink	n/a	A "quicklink" is a system navigational option that if selected takes a user to a specific action on the site.
Register	Register Now	Request a user account on the system.
Required Field	*	A red asterisk next to a field label indicates that the field is a required.
Response	n/a	If the Buyer enables the "Bids/Responses" feature for an opportunity, vendors can submit electronic responses in the form of a Line Item Builder template and/or a document upload; vendors must login to be able to submit an electronic response and can review their responses at any time.
Review		"Review" opens an object for review.
Save	Save	The "Save" button saves the entered data on the form. User will be required to complete all required fields on the form.
Search Agent	n/a	Vendors can set up "search agents" based on selected detailed search elements. Search agents can be run on an ad hoc or scheduled basis to highlight newly filed opportunities which align with the designated search criteria.
Sensitive, but unclassified Document	n/a	Vendors are required to logon to the system and to have a valid MPIN on file, to review controlled, unclassified documents. "Export Controlled" and "explicit access" are more stringent access controls that may also apply to controlled, unclassified documents.
Sub-tab	n/a	These are sections of a main navigation that a user can move to while in that main navigation (e.g., "my profile" is a main navigation, and "account" and "contact information" are sub tabs in that main navigation).
Vendor	n/a	Provider of services.
Watched List	n/a	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 quicklink and the vendor receives a daily "Watched List" notice email that outlines any changes impacting a notice on their Watched List target of opportunities. **Note:** This functionality is similar to "register to receive notification" where vendor requested to receive updates if an opportunity was updated.

2 Logging onto the System

2.1 System URL

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

2.2 Navigation Bar on Logon Page – Unsecured features

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

I. Getting Started – Provides basic training materials, such as User Guides and Frequently Asked Questions (FAQs).
II. General Information
III. Opportunities (for all agency/office locations) – Users can search and review opportunities without logging onto the system. Any controlled, unclassified documents that may be attached to an opportunity will require that the user be logged into the system and that the user have a validated account.
IV. Agencies
V. Privacy

Note – Green versus blue on the main navigation indicates which navigational element has been selected.

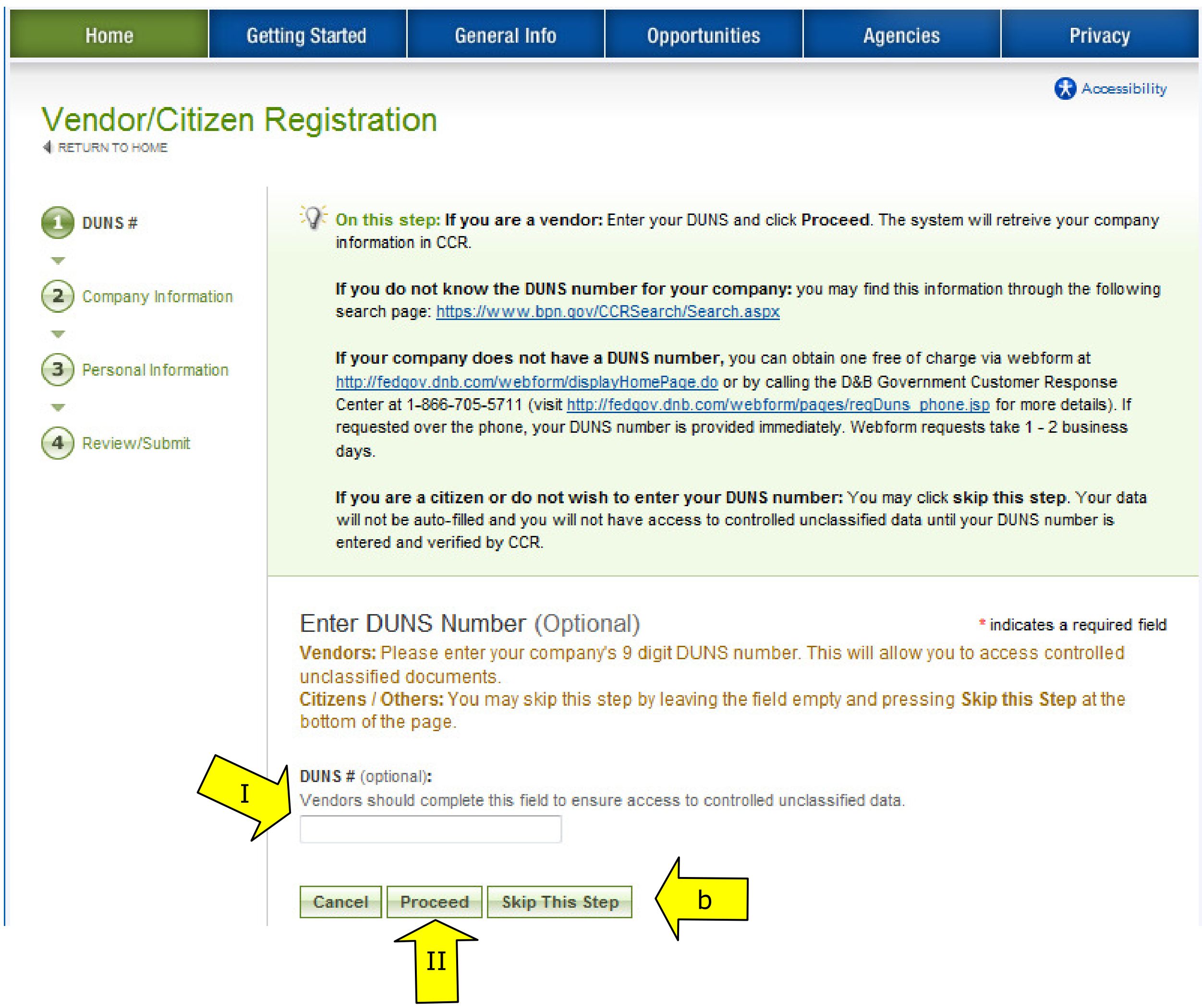
2.3 Register for an Account

Note - Before a vendor registers in the system, they will need a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities. This system retrieves a firm's profile information directly from the CCR system. Please contact http://www.ccr.gov for more information.

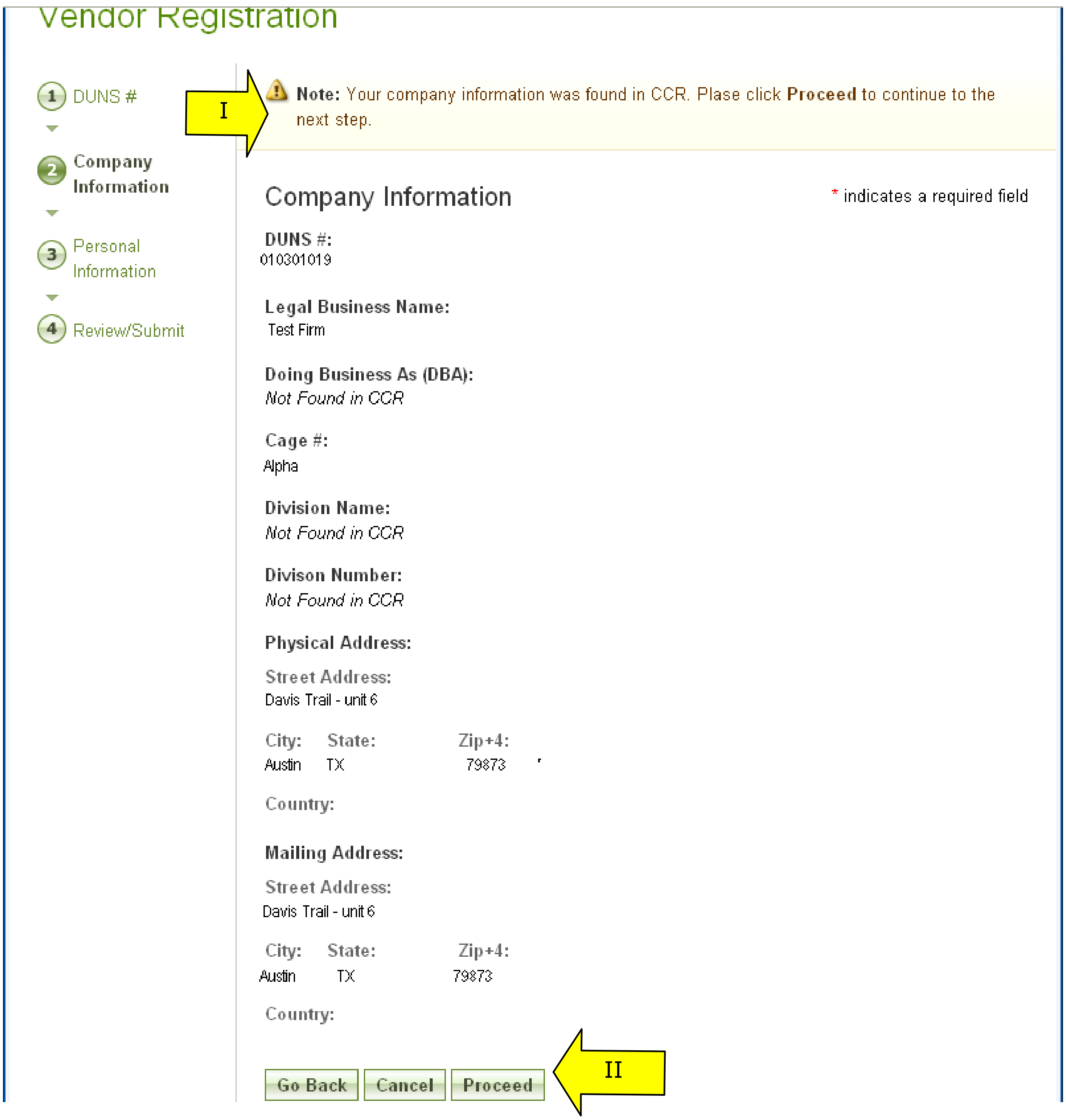
I. To get started, go to fbo.gov and click on the "Register Now" link located in the green "Vendors / Citizens" section. This will open up a series of screens where the user enters registration data.

I. Step one–"DUNS #" - Enter your company's 9 digit DUNS #
   a. Vendors should provide the DUNS# to be able to access controlled, unclassified data associated with some business opportunities in FBO.
   b. If you do not have, or do not wish to provide, the DUNS #, click "skip this step". Data will not be auto-filled and vendor will not have access to controlled, unclassified data.

II. If user entered the DUNS #, click the "proceed" button to move to the next step.



I. Step two–"Company Information" is pre-populated on the form based on the entered DUNS # and registrant is asked to update any required fields. If not found, user will be requested to enter data on form.
II. Select "proceed" to move forward in the process.



Vendor Registration

1 DUNS #
2 Company Information
3 Personal Information
4 Review/Submit

I

Note: Your company information was found in CCR. Plase click **Proceed** to continue to the next step.

Company Information

* indicates a required field

DUNS #:
010301019

Legal Business Name:
Test Firm

Doing Business As (DBA):
Not Found in CCR

Cage #:
Alpha

Division Name:
Not Found in CCR

Divison Number:
Not Found in CCR

Physical Address:

Street Address:
Davis Trail - unit 6

City:	State:	Zip+4:
Austin	TX	79873

Country:

Mailing Address:

Street Address:
Davis Trail - unit 6

City:	State:	Zip+4:
Austin	TX	79873

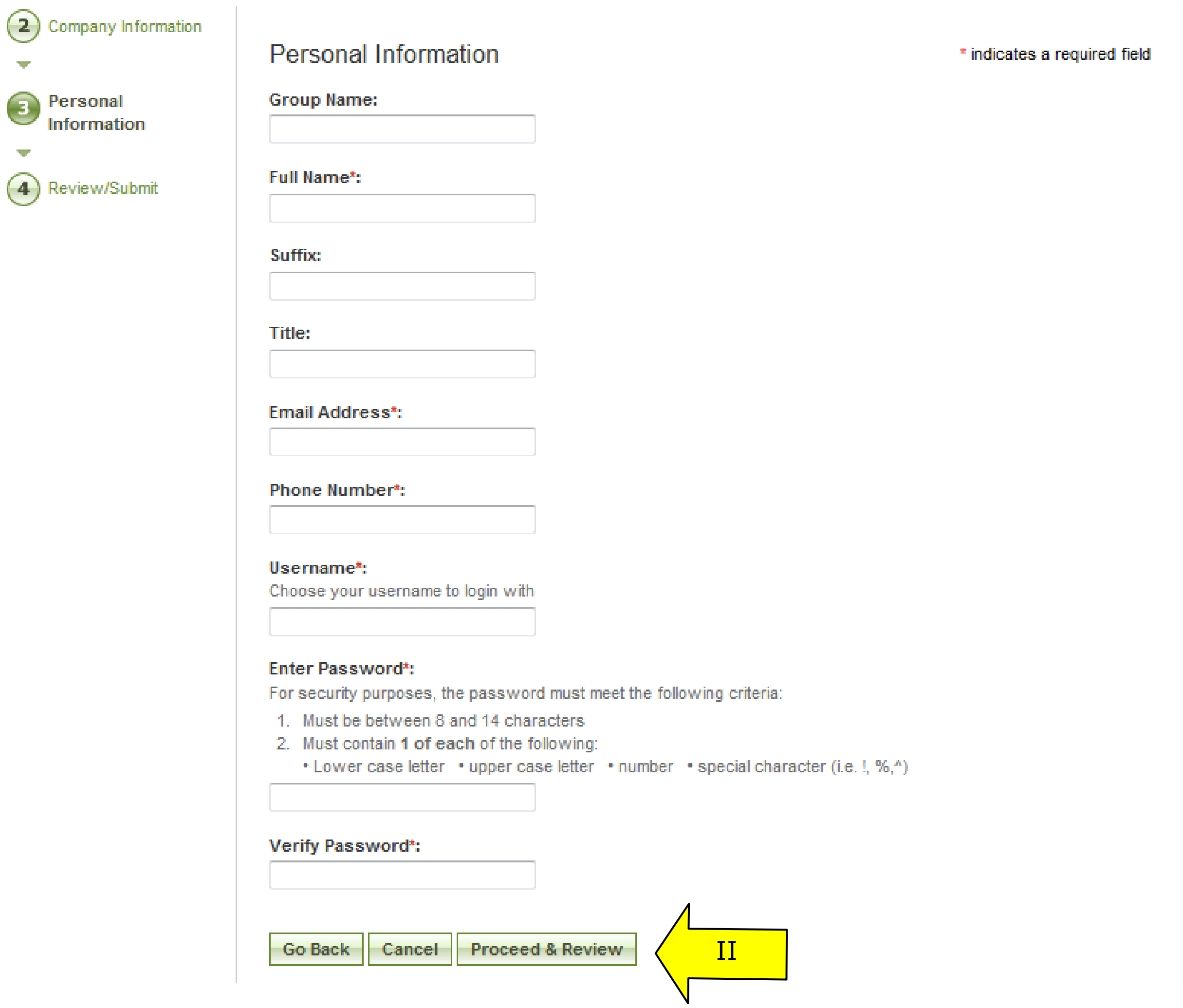
Country:

Go Back | Cancel | Proceed

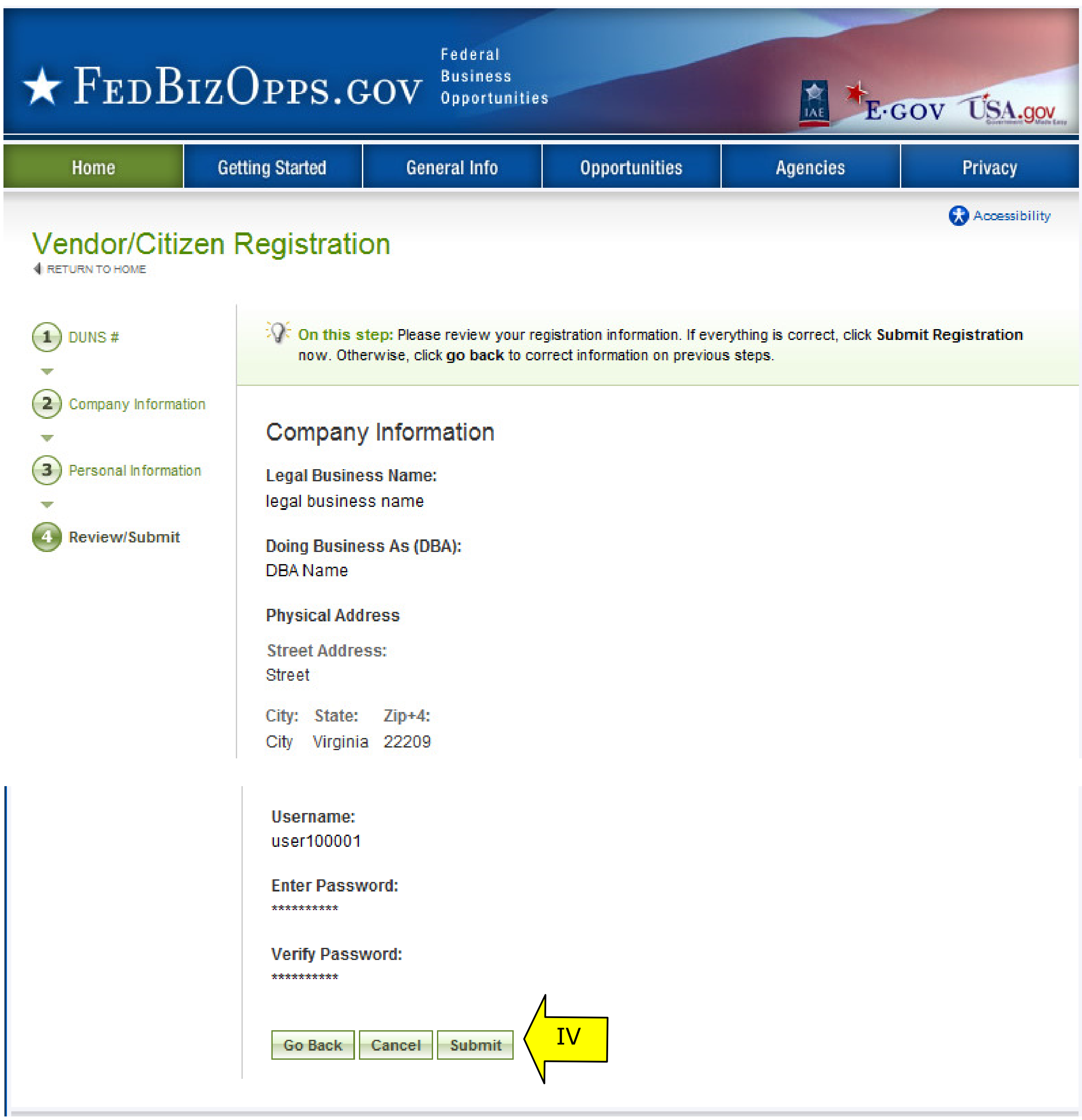
II

I. Step three – "Personal Information" - Registrant enters contact information, username and password. When registrant enters a desired password, for security purposes, the password must meet the following criteria:
    a. Must be between 8 and 14 characters
    b. Must contain 1 of each of the following:
        i. lower case letter
        ii. upper case letter
        iii. number
        iv. special character (e.g. !, %,^)

II. Once required fields are entered, select "proceed & review".

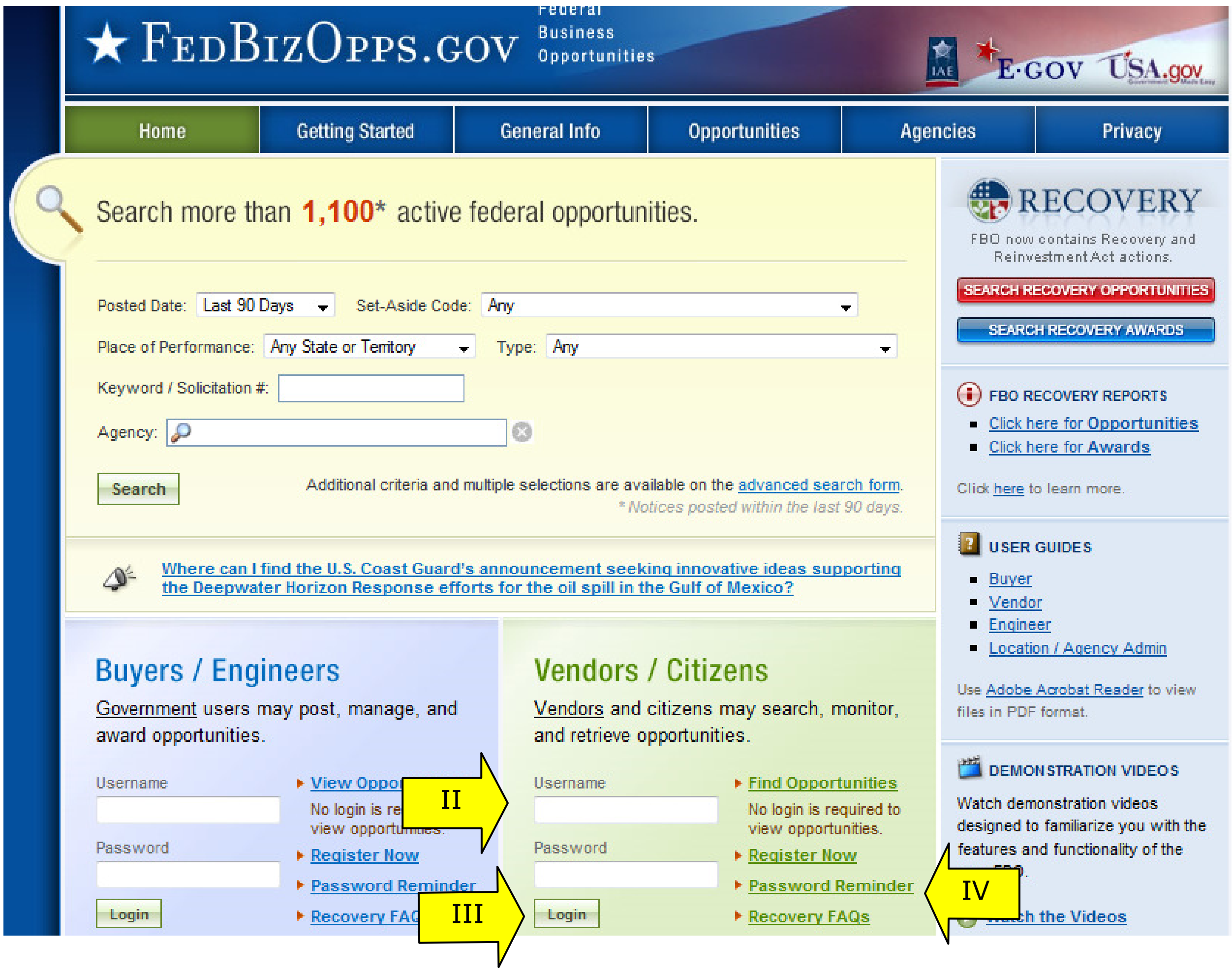


I. Review/Submit - Registrant is asked to review registration information. If everything is correct, click "submit" (at bottom of page).
II. Otherwise, at the bottom of the page click "go back" to correct information on previous steps.
III. "Cancel" cancels the account registration.
IV. "Submit" enters the registration.
V. Users receive an e-mail after submitting a registration request which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail. **Users will not be able to logon to the system until they have complied with the requirements specified in the email.**



2.4 Returning Users – Log into the system

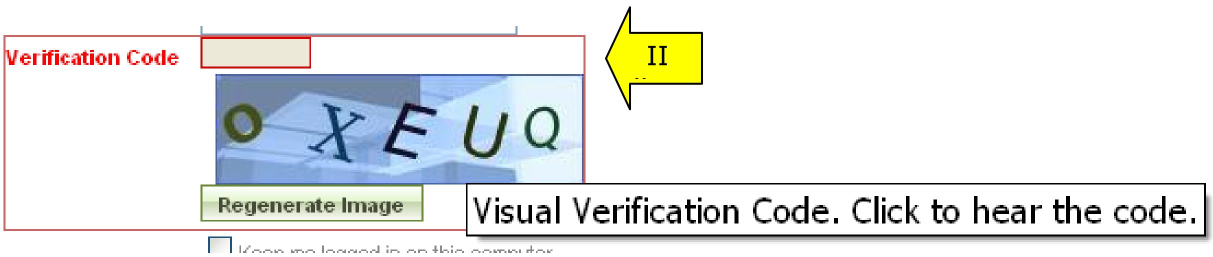
I. Point your browser to https://www.fbo.gov.
II. Enter username and password.
III. Click "Login."
IV. The "Password Reminder" option allows a user to request a password via email



2.5 Captcha Security

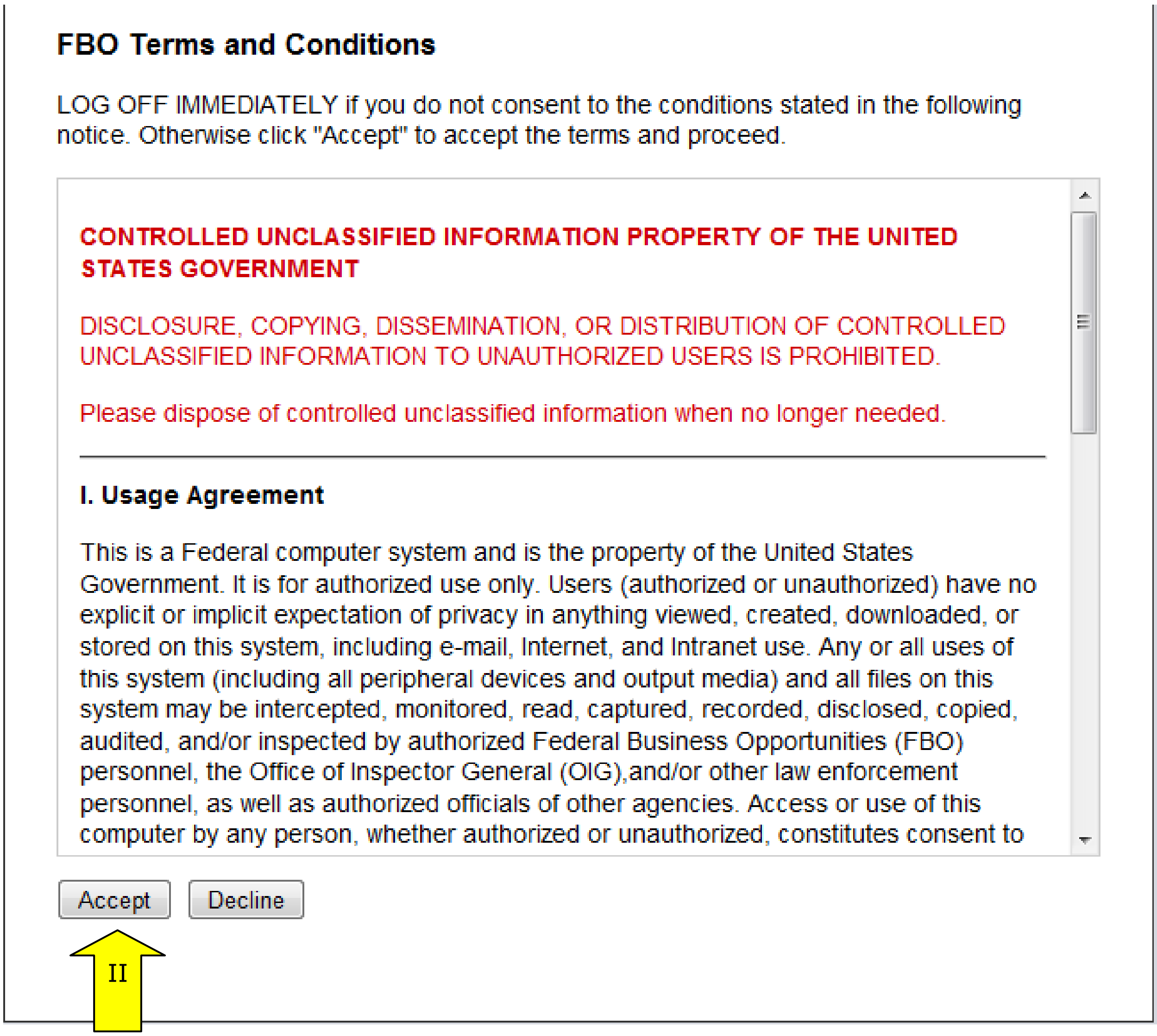
I. Login Security – When a user (or machine) enters a username or password incorrectly three consecutive times, a captcha (image with characters) is displayed as a check to see if the user attempting to log in is indeed a human user.

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.



2.6 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."
III. If you do not consent to the conditions stated, select "Decline." Decline logs the user off the system.



3 Vendor 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 "go" after search filters have been entered on a list).

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

3.2 Top of Page Navigation

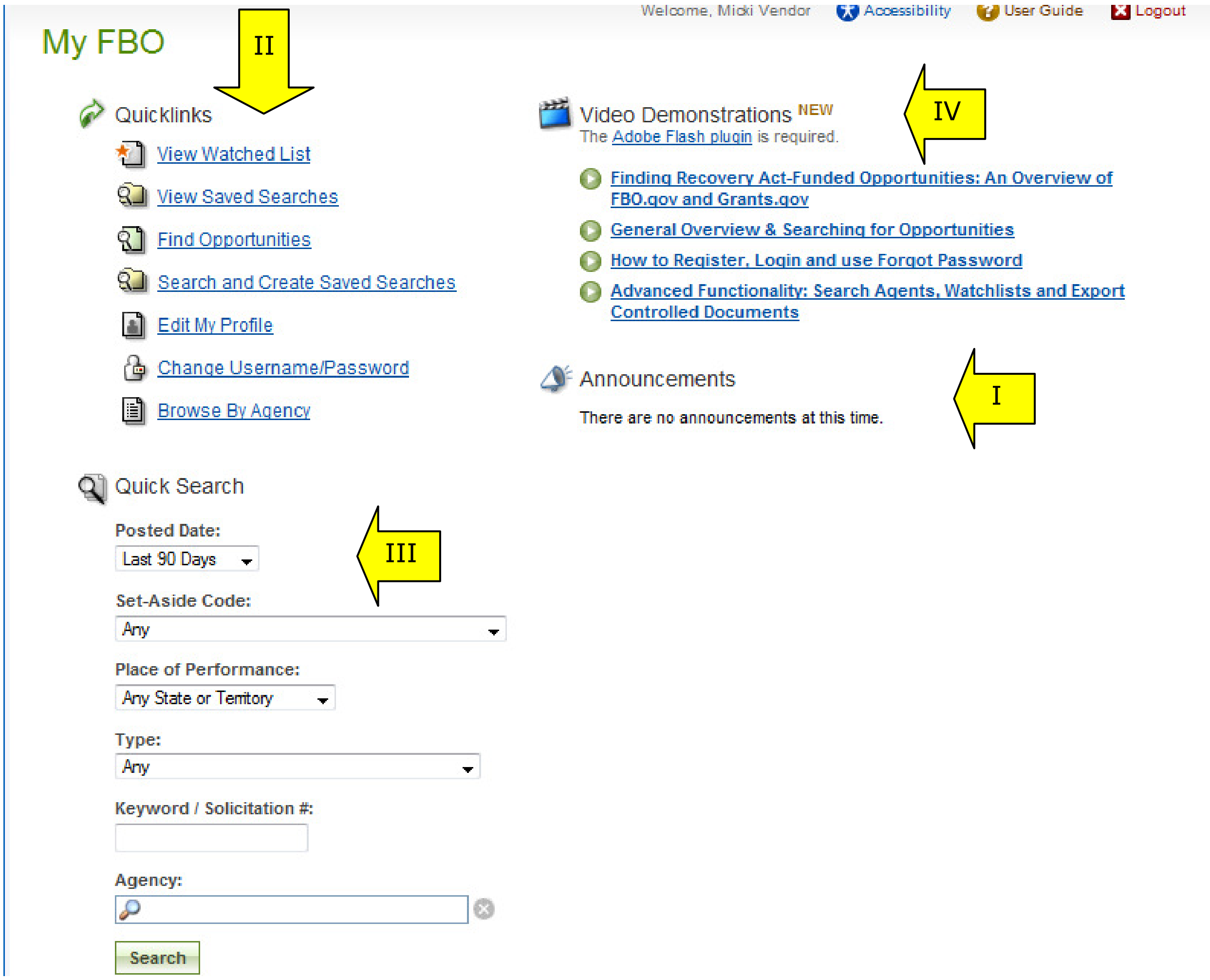
Navigation for the vendor's secured interface appears across the top of the user's page. Using this navigation, users can move between the following key navigational elements: "My FBO", "My Profile", "Opportunities", and "Agencies".

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

3.3 My FBO

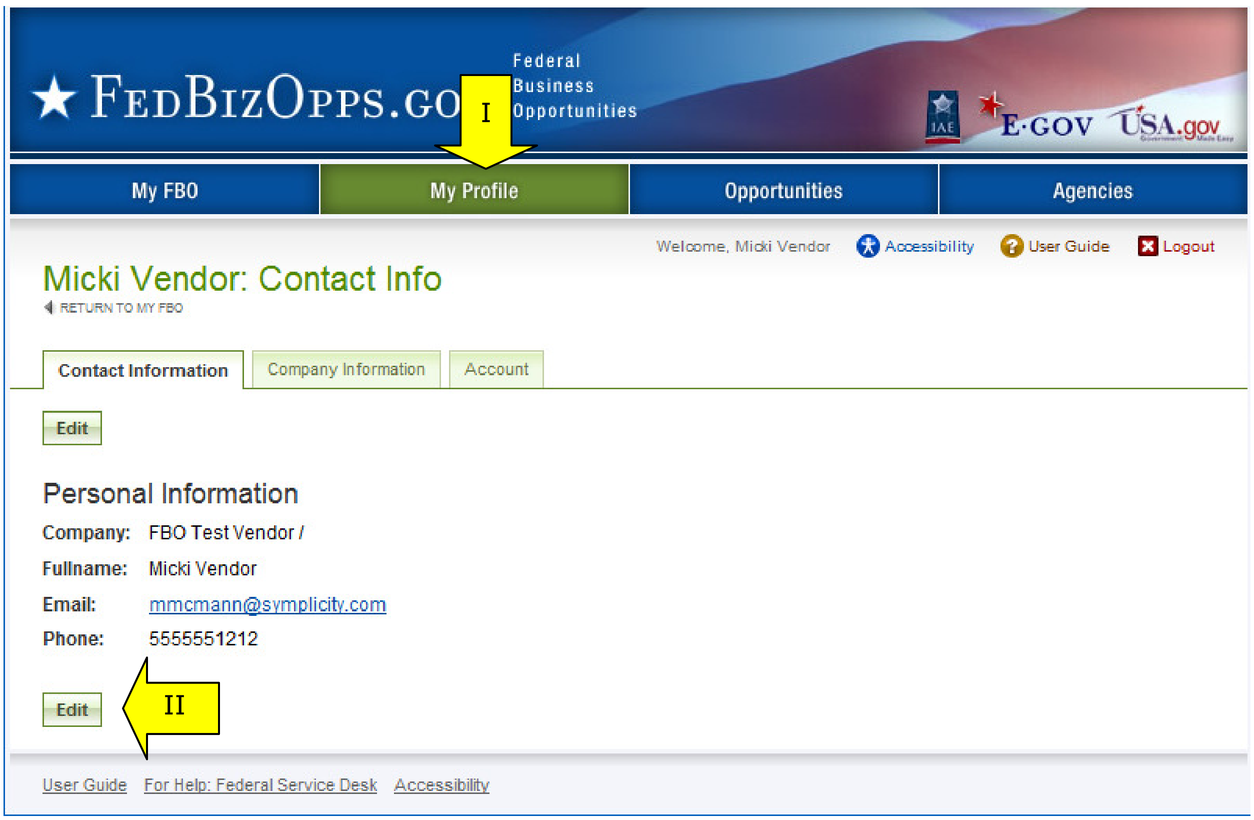
"My FBO" is a user's home page (resource page). The page allows for easy access to the following system features:

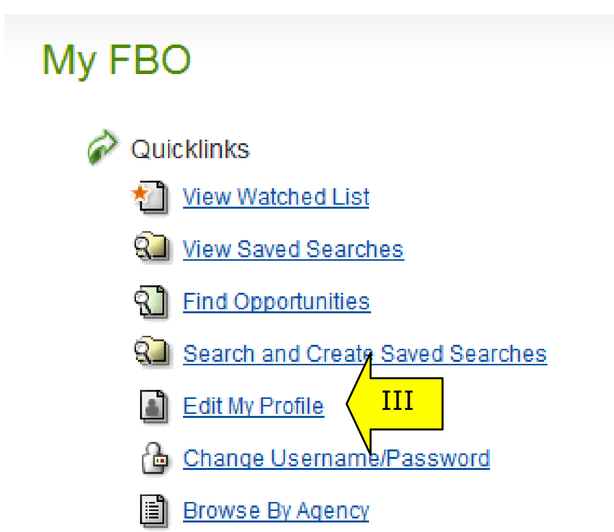
I. "Announcements" – System Announcements posted for the user's reference.
II. "Quicklinks" – Navigational options that if selected take a user to a specific action on the site (e.g., "view saved searches").
III. "Quick Search" – Ability to search for business opportunities quickly by either posted date, set-aside code, place or performance, notice type, agency and/or keyword/Solicitation #.
IV. Video Demonstrations



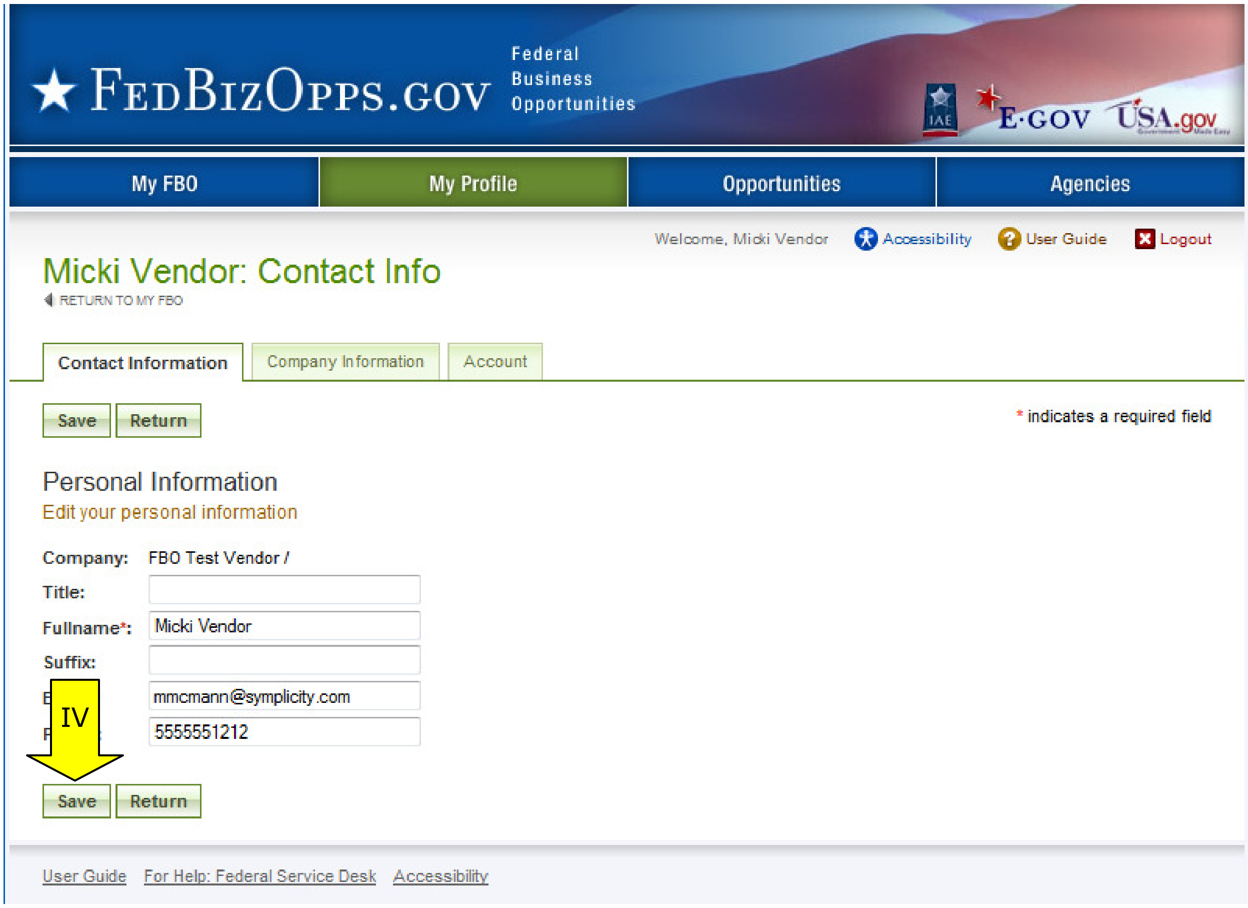
3.4 My Profile

I. There are three tabs on the users "My Profile" page. On these tabs the user is able to update "contact information," "company information" and "account" data.
II. From the "contact information" tab, select "edit" to change contact fields.
III. Alternatively, a vendor can use the quicklink "Edit Profile" on their "My FBO" home page to get to the screen where they can edit their profile.

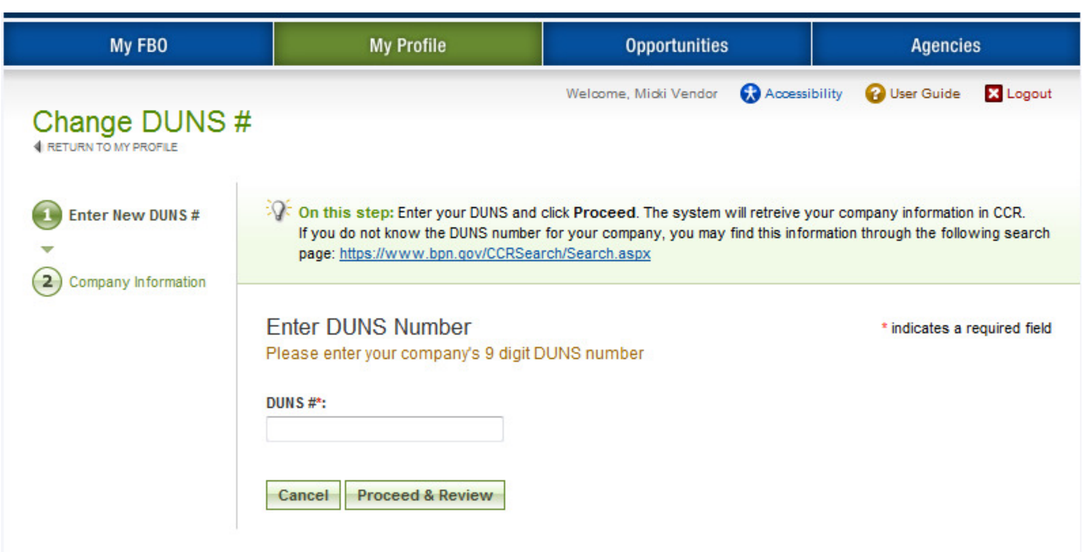




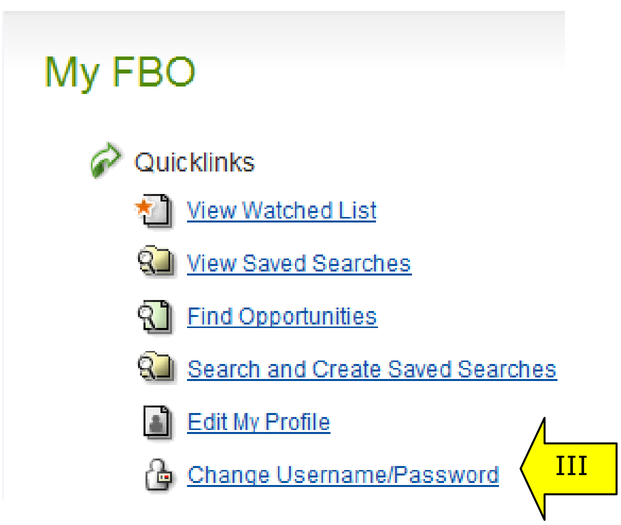
IV. Enter field changes as desired. Select "save" to save updates to the form.



I. From the "company information" tab, users can review their company's profile data. No changes can be made on this screen once information has been validated by CCR. Contact CCR to make edits to this profile.
II. If a vendor did not register initially using a DUNS# or the vendor needs to update the DUNS# in their profile, they can do so from this tab by clicking the "register duns" button. The system will attempt to pull the profile data from CCR.gov if found.



I. From the "account" tab, users can change their username or password.
II. Select "save" to save updates to the form.
III. Alternatively, a vendor can use the quicklink "Change username/password" on their "My FBO" home page to get to this screen where they can edit their username or password.



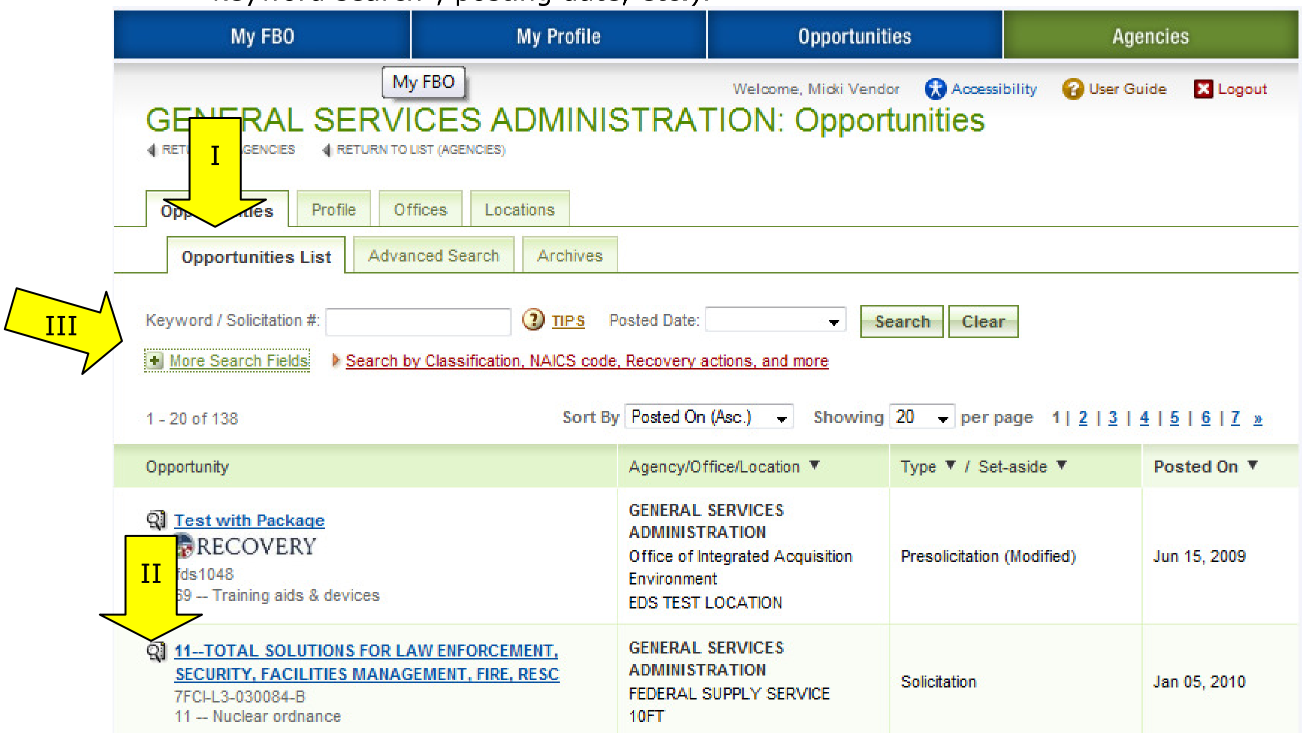
3.5 Opportunities

I. There are six sub-tabs on the "Opportunities" navigation.
II. When the navigation is opened, the user is taken to the "opportunities list" (will be initially filtered to recently posted opportunities). The keyword search field searches several opportunity fields (e.g., title, agency, solicitation number, and description). This is a "full text" search (meaning you need to match full words).
III. Click the "search by agency, set-aside, state, and type" link in green to display additional search filters within the opportunities list; click the link again to hide the filters. The "search by classification, NAICS, Recovery action, and more" link will take the user to the Advanced Search tab.
IV. The next tab to the right is an "advanced search" tool. On advanced search, a complete set of search field options are presented.
V. The "watched" tab presents opportunities that a vendor has saved on their "Watched List". The "Watched List" is easily accessed with a quicklink from the vendors My FBO (home) page. The vendor receives a daily "Watched List notice" email that outlines any changes impacting a notice on their Watch List target list. **Note:** This functionality is similar to "register to receive notification" where vendor requested to receive updates if an opportunity was updated.
VI. Vendors can set up "search agents" based on selected detailed search elements. Search agents can be run on an ad hoc, or scheduled, basis. Search agents can help vendors identify opportunities that align with the designated search criteria.
VII. The "bids/responses" tab presents a list of all the vendor's responses to online requests for bids/responses for specific opportunities, including drafts and submitted responses.
VIII. "Archives" lists non-active notices which are not visible to vendors/public.
IX. A vendor can use the quicklink "Find Opportunities" on their "My FBO" home page to get to this "opportunities" tab.

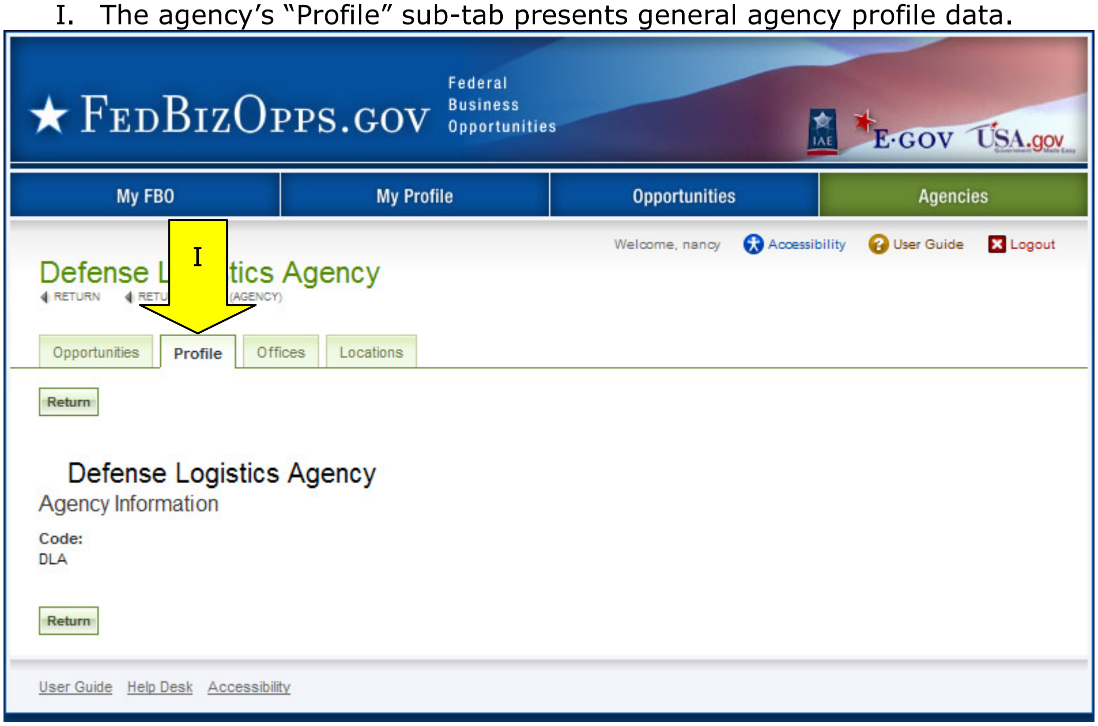
3.6 Agencies

I. The “agencies” main navigation takes the vendor to a list of registered agencies in the system.
II. Alternatively, a vendor can use the quicklink “Browse by Agency” on their “My FBO” home page to get to the “agencies” tab.
III. Click on the review icon to open up a page that presents specific profile data for the agency, office locations, and a listing of active and archived opportunities associated with that agency.
IV. Keyword search is available to help users more quickly find a particular agency.

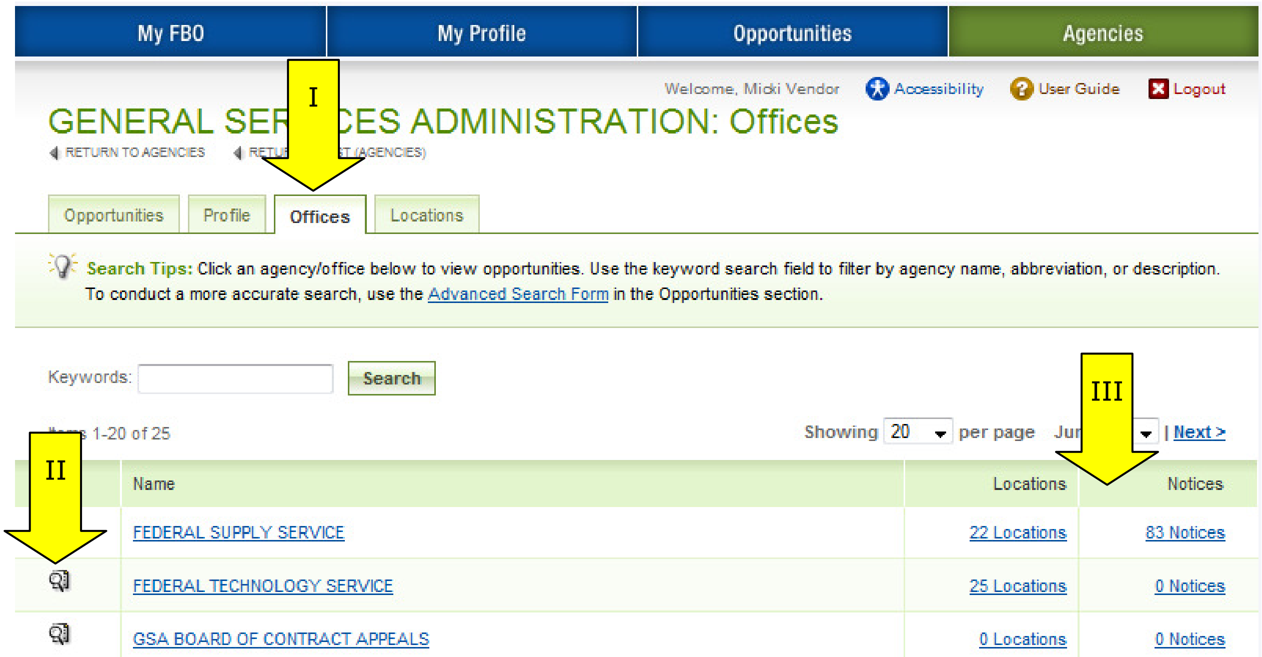
I. When an agency record is opened, the user is on the "opportunities" sub-tab for that agency. Opportunities for that agency will be listed on this page.
II. Use the review icon to open the opportunity.
III. Additional filter options can be used to target specific opportunities (e.g., "keyword search", posting date, etc.).



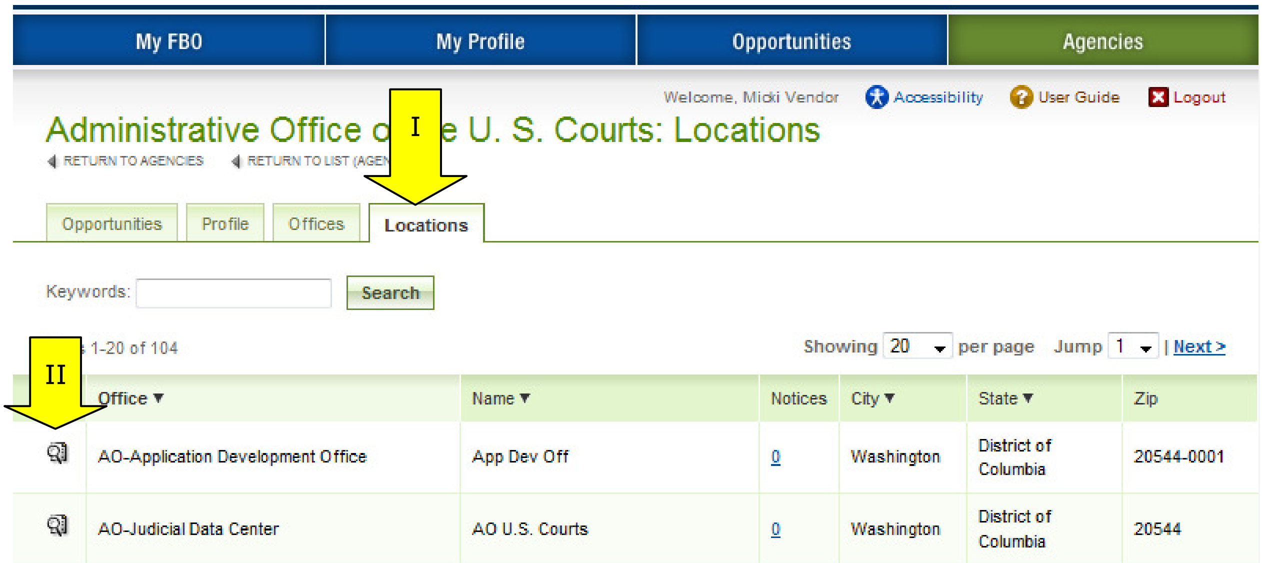
I. The agency's "Profile" sub-tab presents general agency profile data.

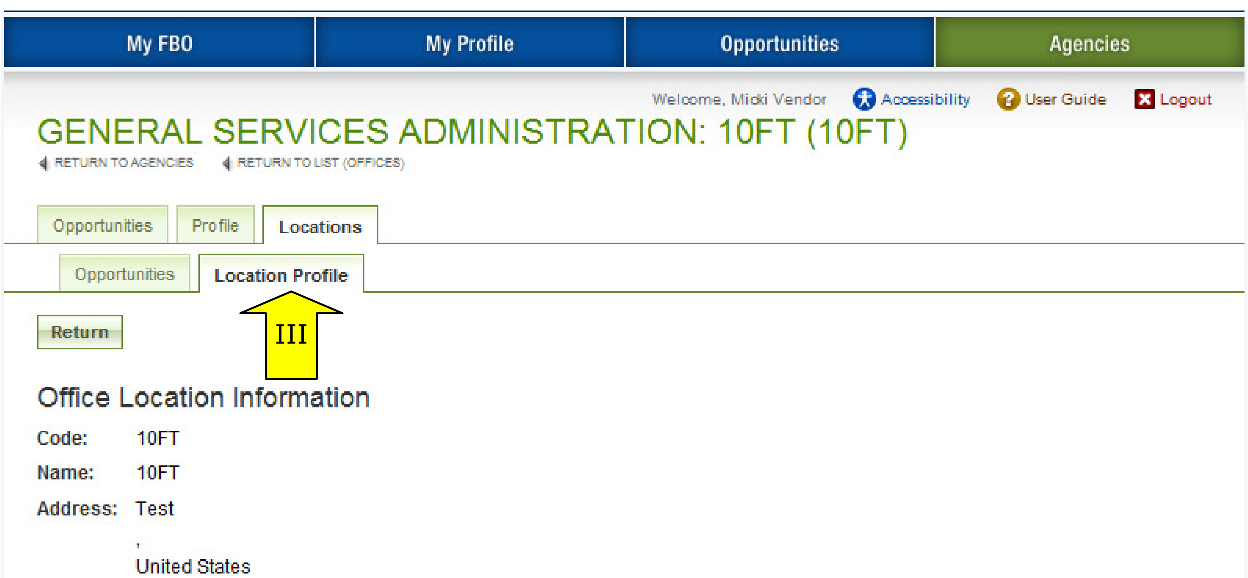


I. The "Offices" sub-tab presents a listing of the agency offices. Depending on an agency structure, the "office" navigation may be absent. This would mean that the agency's structure does not include a subordinate office.
II. Use the "review" icon to open a list of a specific office's opportunities.
III. Click on the links in the two left columns to navigate directly to a specific Office's list of Locations of Notices.



I. The "Locations" sub-tab, presents a listing of the agency locations.
II. Use the "review" icon to open location's opportunities.
III. The "location profile" sub-tab presents profile data for the selected location.

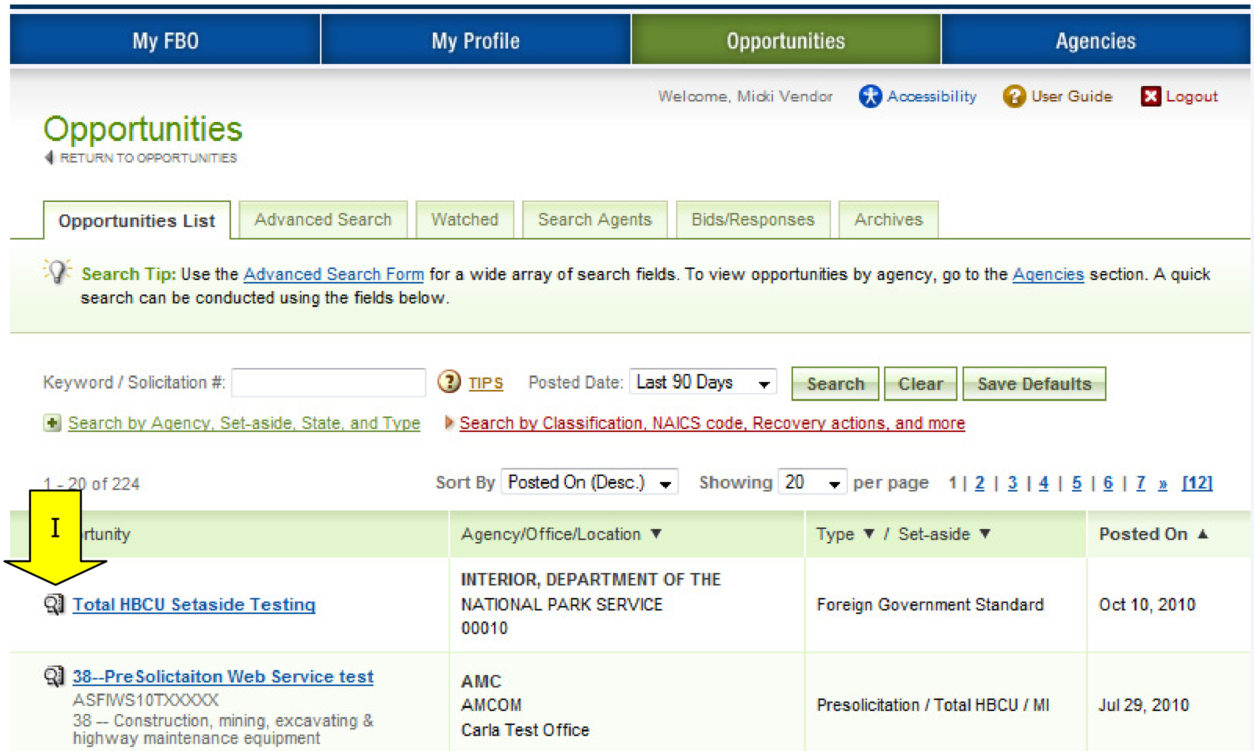




4 Vendor Opportunity Actions

4.1 Reviewing an Opportunity

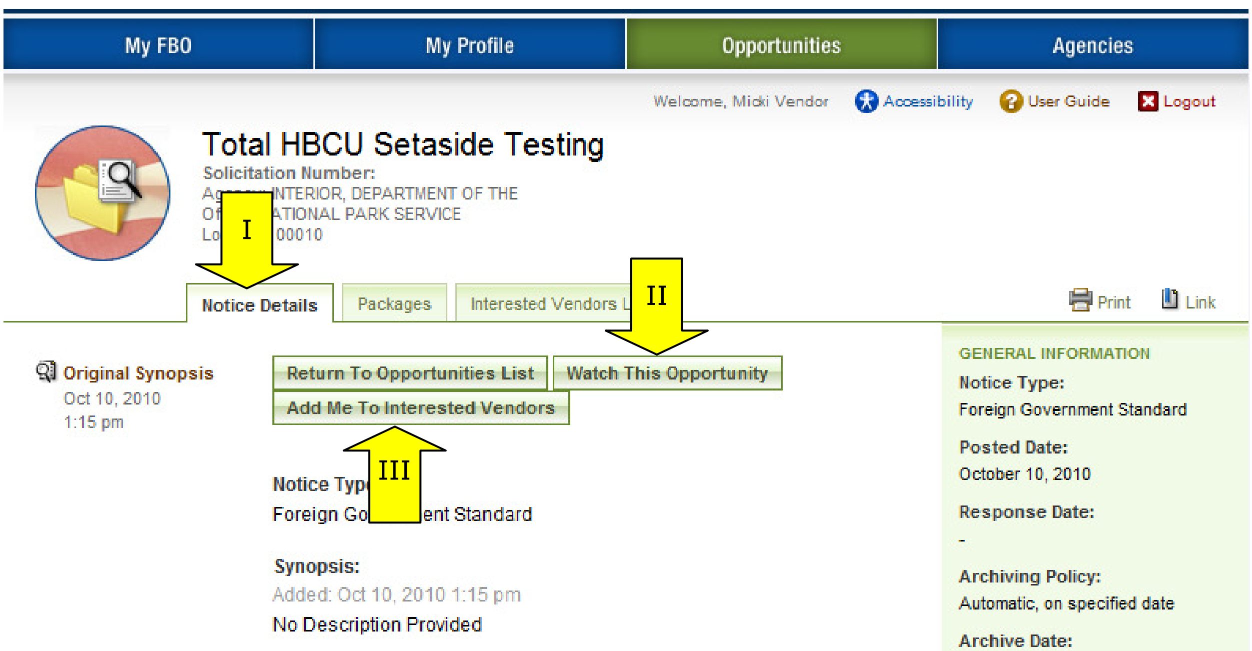
I. To review the details of an opportunity, click the review icon .



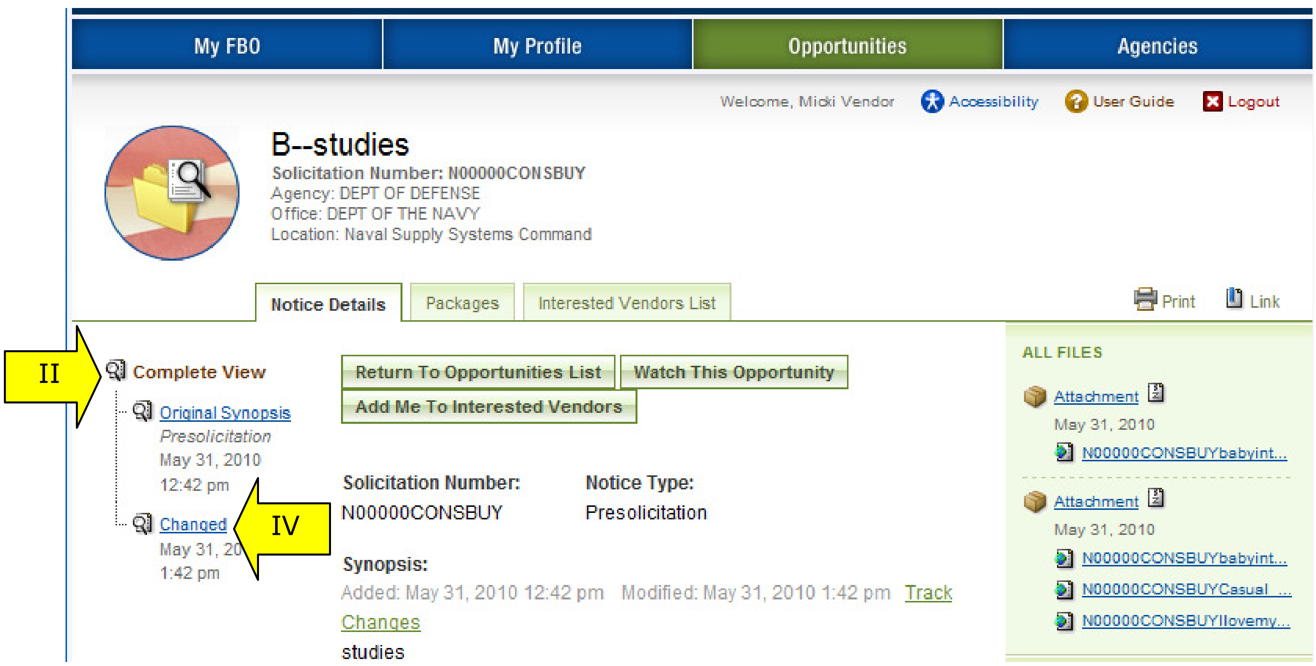
I. Once a vendor has selected the review icon, the "notice details" sub-tab is opened.

II. On the "notice details" sub-tab, besides being able to review the details of the opportunity, a vendor can use "Watch This Opportunity," or if previously added "Stop Watching This Opportunity" options, to manage whether this opportunity is part of their "Watched List" or not. The "Watched List" is a designation that a 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 quicklink, and the vendor receives "Watched List notice" emails that outline any changes impacting a notice on their Watched List target of opportunities. **Note:** This functionality is similar to "register to receive notification" where a vendor requested to receive updates if an opportunity was updated.

III. If the opportunity allows for "interested vendor" designation (established by each buyer on each opportunity), the vendor can manage their designation as being an interested vendor for an opportunity. To do so, click the "add me to interested vendors" (or if previously added "remove me from interested vendors").

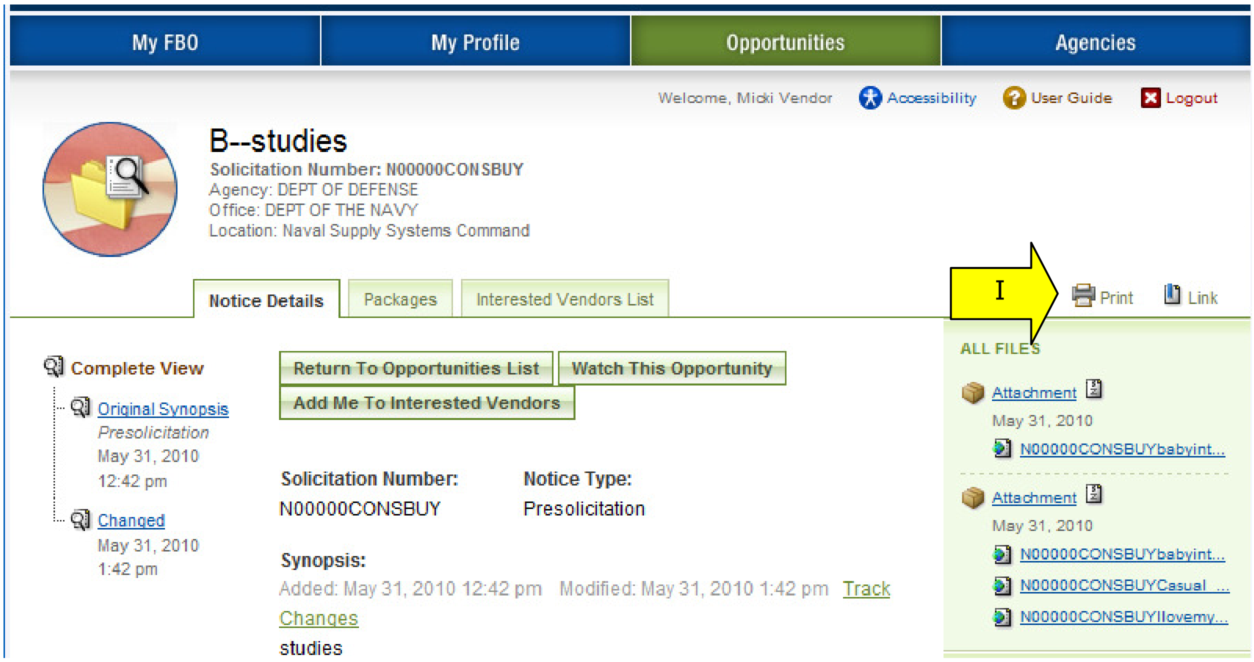


I. Because notices are subject to revisions and updates, the system allows a vendor to review the "original", "amendments/modifications" (including "awards") or the "complete" notice.
II. When opened originally, the display will be the "complete" view of the notice. You will notice a "history tree" on the left of the notice. This history tree presents a complete listing of the notice and how it may have evolved.
III. The record opens to the current complete notice and then the branches under show the original notice (prior to any changes) as a branch, and all the modifications/additions, or awards, as branches in the history.
IV. You may view each branch in the history by clicking on the link for each branch.

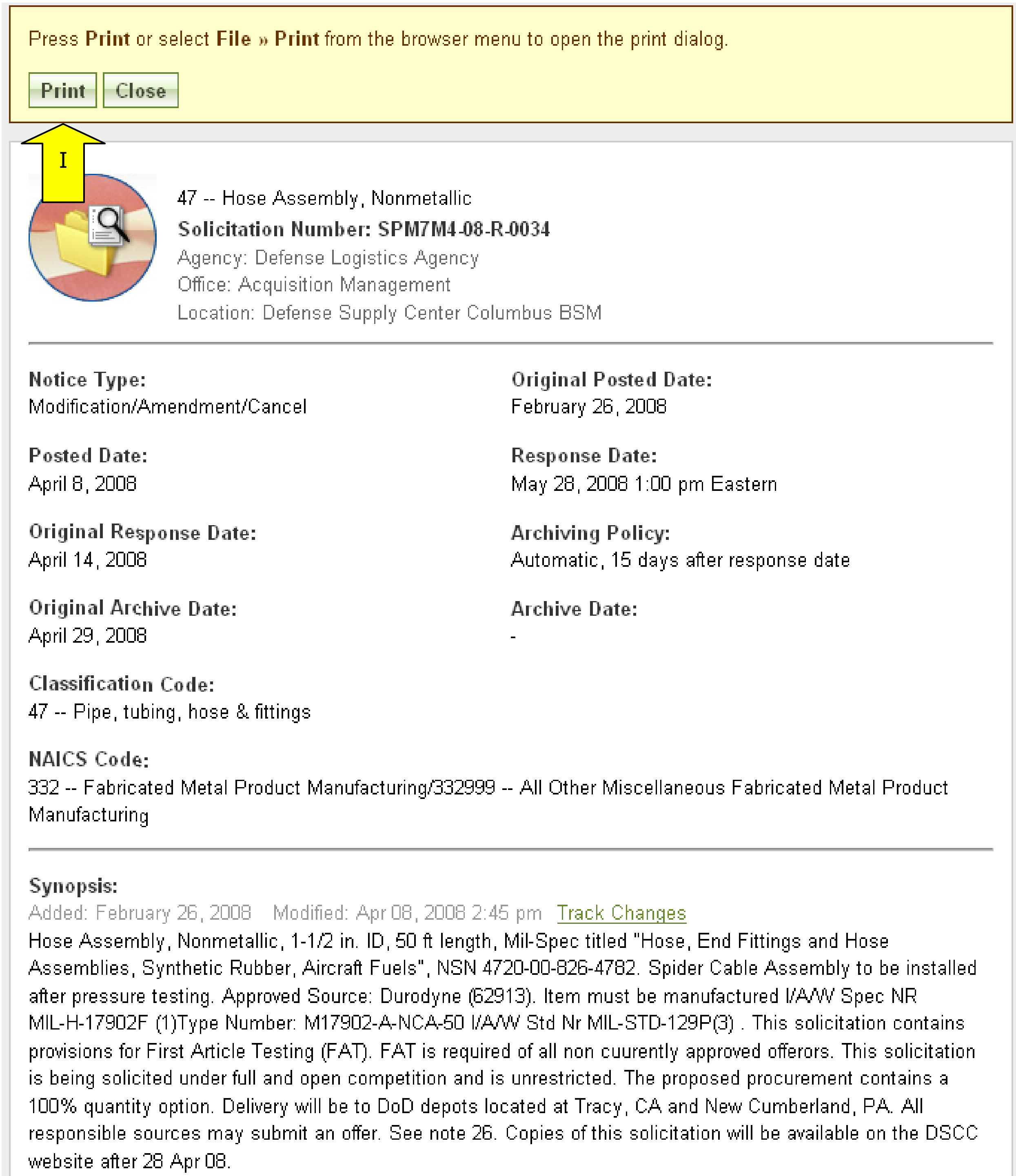


4.2 Printing an Opportunity

I. To open an opportunity in a printer friendly format, select the "Print" icon. Doing so will open a new window with the opportunity laid out for printing.



II. Use the "Print" button to execute the print job.
III. "Close" closes the print window.



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

Print Close

I

47 -- Hose Assembly, Nonmetallic

Solicitation Number: SPM7M4-08-R-0034

Agency: Defense Logistics Agency

Office: Acquisition Management

Location: Defense Supply Center Columbus BSM

Notice Type:
Modification/Amendment/Cancel

Original Posted Date:
February 26, 2008

Posted Date:
April 8, 2008

Response Date:
May 28, 2008 1:00 pm Eastern

Original Response Date:
April 14, 2008

Archiving Policy:
Automatic, 15 days after response date

Original Archive Date:
April 29, 2008

Archive Date:
-

Classification Code:
47 -- Pipe, tubing, hose & fittings

NAICS Code:
332 -- Fabricated Metal Product Manufacturing/332999 -- All Other Miscellaneous Fabricated Metal Product Manufacturing

Synopsis:
Added: February 26, 2008 Modified: Apr 08, 2008 2:45 pm Track Changes

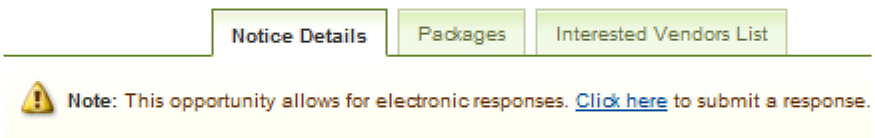
Hose Assembly, Nonmetallic, 1-1/2 in. ID, 50 ft length, Mil-Spec titled "Hose, End Fittings and Hose Assemblies, Synthetic Rubber, Aircraft Fuels", NSN 4720-00-826-4782. Spider Cable Assembly to be installed after pressure testing. Approved Source: Durodyne (62913). Item must be manufactured I/A/W Spec NR MIL-H-17902F (1)Type Number: M17902-A-NCA-50 I/A/W Std Nr MIL-STD-129P(3) . This solicitation contains provisions for First Article Testing (FAT). FAT is required of all non cuurently approved offerors. This solicitation is being solicited under full and open competition and is unrestricted. The proposed procurement contains a 100% quantity option. Delivery will be to DoD depots located at Tracy, CA and New Cumberland, PA. All responsible sources may submit an offer. See note 26. Copies of this solicitation will be available on the DSCC website after 28 Apr 08.

4.3 Managing Electronic Responses to an Opportunity

4.3.1 Submitting an Electronic Response

I. A buyer may enable the submission of electronic responses for certain opportunities. If so, within the "Notice Details" sub-tab of an opportunity, a note will be visible indicating that the opportunity allows for electronic responses. **Note, a vendor must login to the system to be able to submit electronic responses for opportunities.**

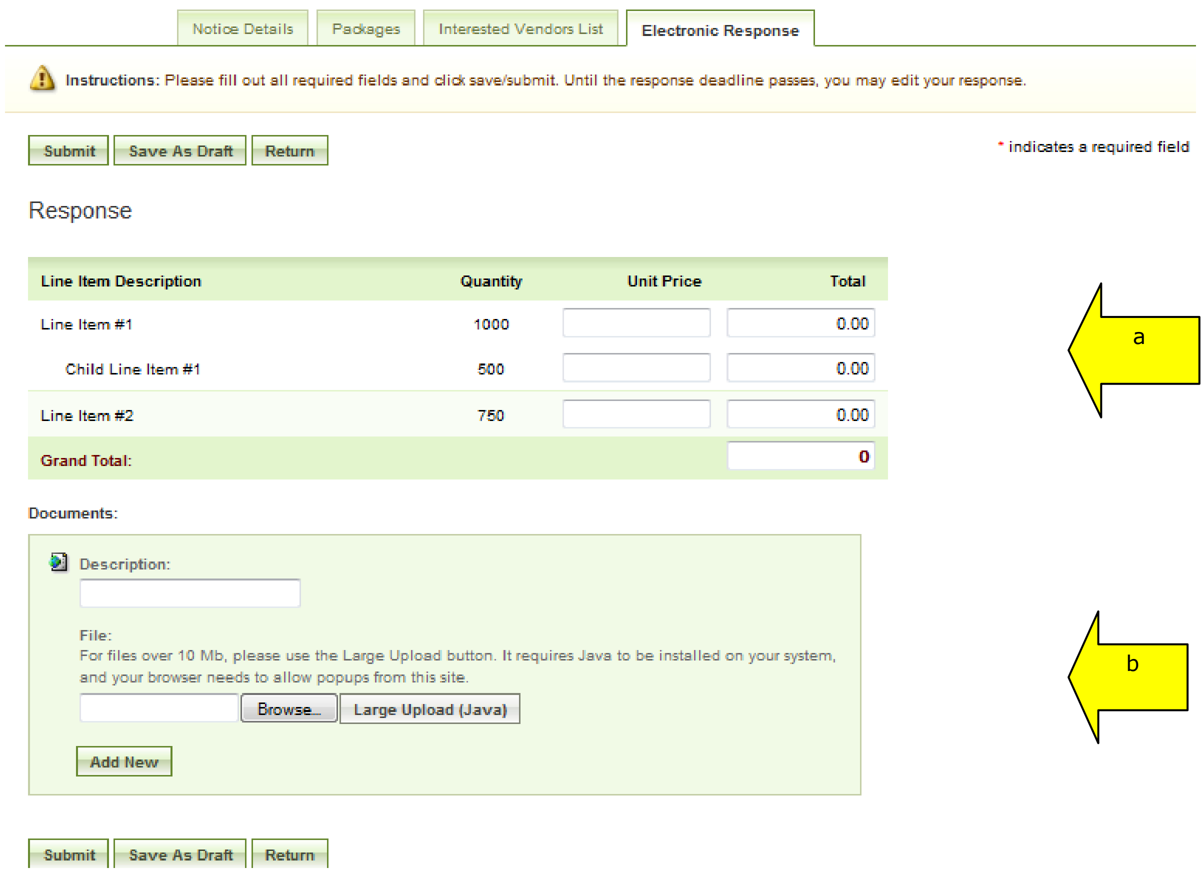
II. There will be a blue "click here" link to submit a response; if selected, the system will open a new tab called "Electronic Response."



III. If the response deadline has passed for that opportunity, the user will no longer be able to submit an electronic response.

IV. There are two possible types of electronic response:
   a. Line Item Builder form and;
   b. Document upload.

What the user sees depends on which response type(s) the buyer enabled for that particular opportunity. So, the user may see *only* the Line Item Builder form, *only* the Document Package upload, or both the form and upload options. The below screen shot illustrates both response types as displayed to the user:



V. The Line Item Builder form will provide the following information in spreadsheet fashion:
   a. Line Item Description;
   b. Child Line Item Description which will be indented under the related parent Line Item;
   c. Quantity per Line Item and Child Line Item

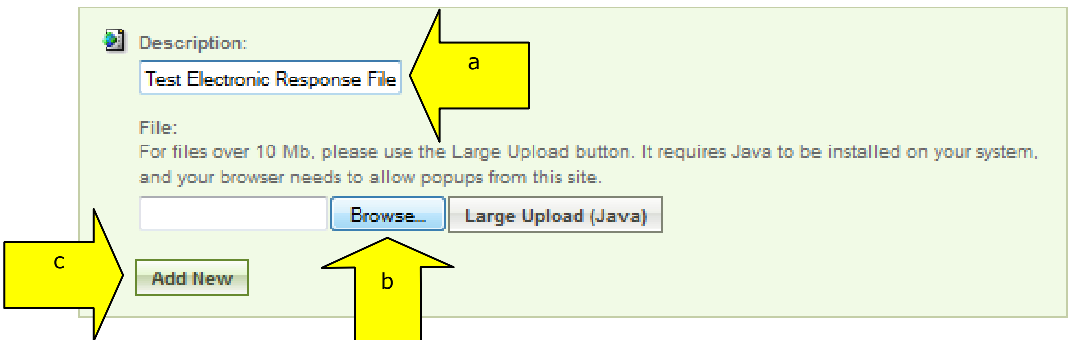
VI. The user must enter a price per Line Item in the "Unit Price" column; the Total column will calculate the Quantity multiplied by the price entered; the system will also calculate the Grand Total price (sum of all Line Item Totals) which will be displayed in the last row of the form.

Line Item Description	Quantity	Unit Price	Total
Line Item #1	1000	25.00	25000
Child Line Item #1	500	5.50	2750
Line Item #2	750	100.00	75000
Grand Total:			102750

VII. The "Documents" section allows the user to submit files as part of their electronic response to the opportunity.

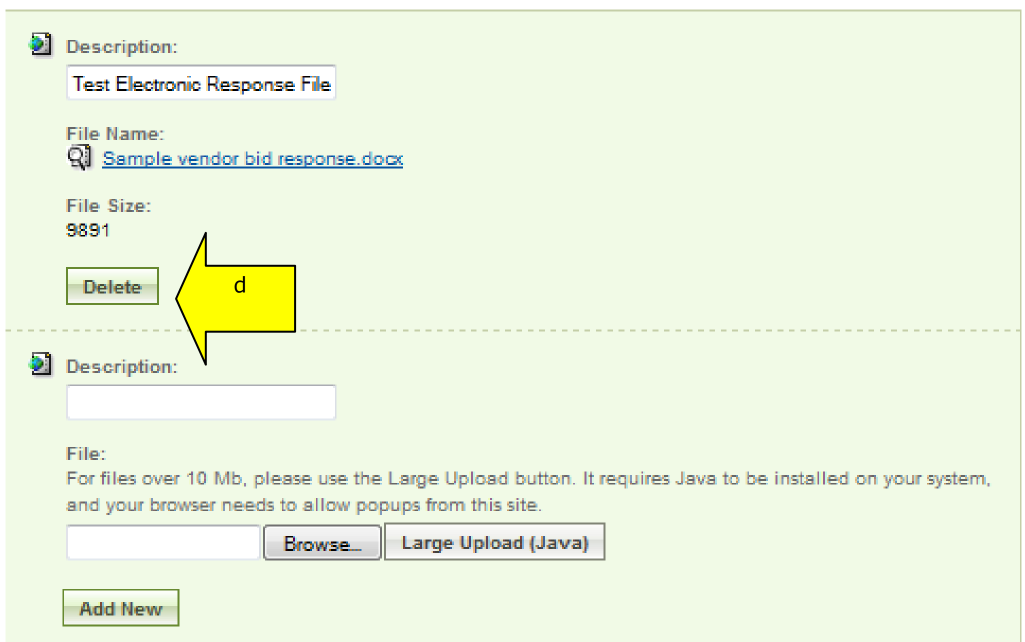
a. The user can enter a description for every file to be uploaded, note this is optional.
b. To select a file for upload, the user clicks on the "Browse" button. (Note, for files over 10 Mb, please use the "Large Upload (JAVA)" button.) This will allow the user to select a file located on their computer for upload.
c. After selecting the file, the user can click the "Add New" button to select additional files for upload.

Documents:

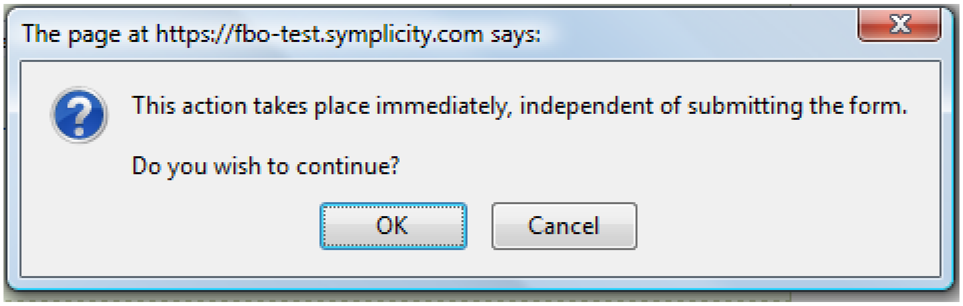


d. The user can delete any file(s) previously selected for upload by clicking on the "Delete" button.

Documents:



Note, the system displays a warning if the user clicks the "Delete" button and provides the option to cancel the action.

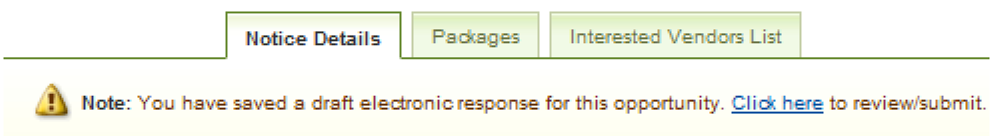


If the user clicks "OK," the system will immediately remove the file and returns the user to the "Response" page.

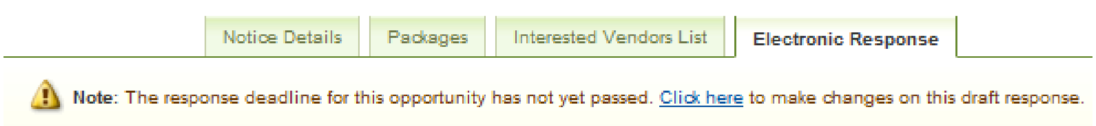
VIII. The user has three options at the bottom of the "Response" page:

a. "Submit" saves and electronically submits the response to the government point of contact for that opportunity in the system. Note, the system will send an email to the email address on file for the user confirming the electronic submission;

b. "Save as Draft" saves the response created, but does not submit it to the government point of contact for the opportunity in the system; if selected, the system returns to the "Notice Details" tab and there is a note at the top indicating that the user has saved a draft response for the opportunity. The user can click on the blue "Click here" link in the note to review/submit a response.



After clicking the link to review/submit, the system opens the "Electronic Response" tab and displays the draft response for review. There is a note at the top which will advise the user whether or not the response deadline has passed. If not, the user can click on the blue "Click here" link to make changes to the draft response and submit if ready.

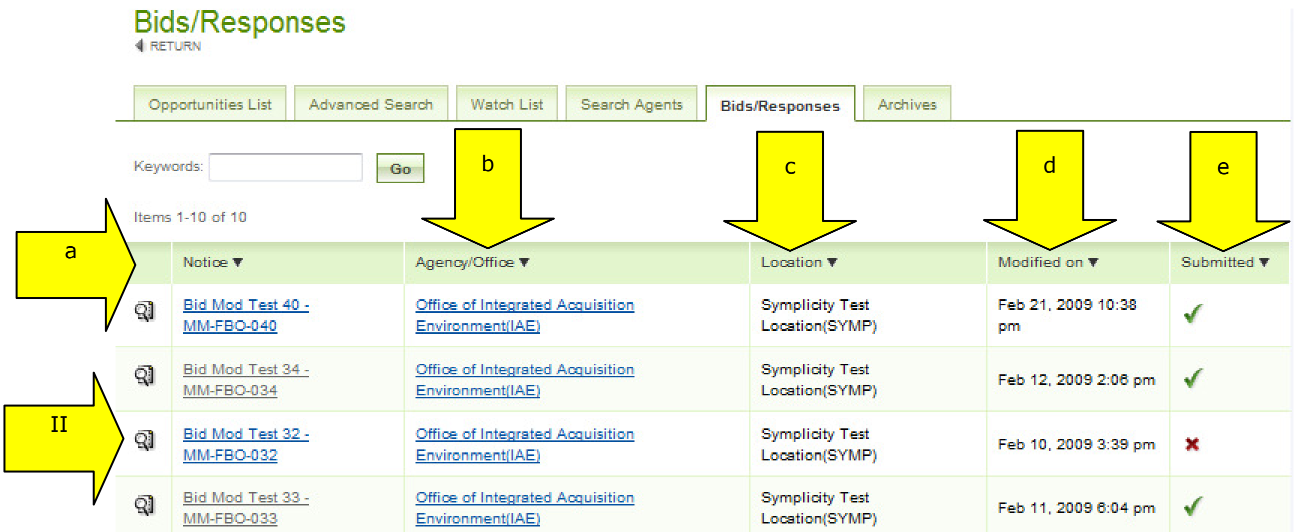


c. "Return" does not save the response and takes the user back to the "Notice Details" tab for the opportunity.

4.3.2 Reviewing / Editing an Electronic Response

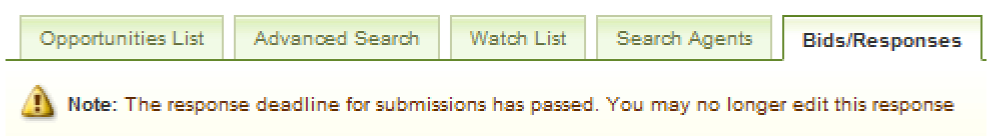
I. Once a user logs into the system, they can either click on the "Find Opportunities" Quicklink on the "My FBO" page, or click on the "Opportunities" button located in the top navigation. Within the "Opportunities" section, the user can click on the "Bids/Responses" tab to review a list of all electronic responses. The list will display the following information:

   a. Notice title (user can click the title to go to the "Notice Details" page);
   b. Agency/Office associated with the opportunity;
   c. Location associated with the opportunity;
   d. Date the response was last modified;
   e. Submitted status (green check if submitted; red x if not submitted);

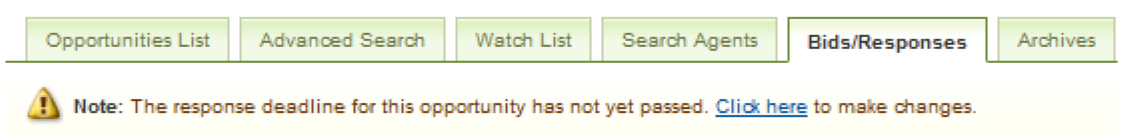


II. The user can click on the "View" icon next to an opportunity to review the response.

   a. If the response deadline has passed for the opportunity, the system will display the following message at the top of the "Bids/Responses" tab indicating that the user may no longer edit the response.



   b. If the response deadline has not yet passed, the system will display the following note at the top of the "Bids/Responses" tab indicating that the user can make changes to the response:



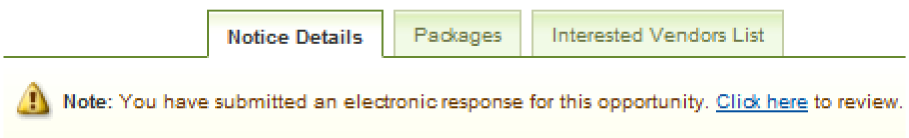
III. To edit the response, click on the blue "Click here" link in the note. At this time, the user can edit the prices entered previously for any Line Item in the Line Item

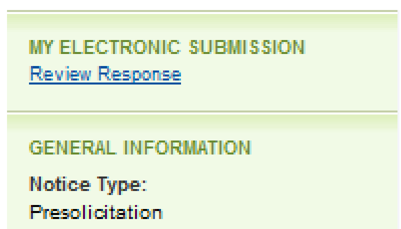
Builder. In addition, the user can review any documents previously uploaded, as well as delete and/or upload additional documents. There are two options on this page:

a. "Submit" saves any changes made and submits the response to the opportunity. Note, the system will send an email to the email address on file for the user confirming the electronic submission;
b. "Return" does not save any changes made and takes the user back to the complete list of responses.

IV. A user can also review their submitted electronic responses from the "Notice Details" tab of an opportunity. From the "Bids/Responses" tab, the user can click on the notice title link to access the "Notice Details" sub-tab. (See sections 3.5 and 4.1 for more information on locating and viewing an opportunity.) If a user previously submitted an electronic response to an opportunity, the system will display a message at the top of the "Notice Details" tab within the opportunity indicating that the user submitted an electronic response.

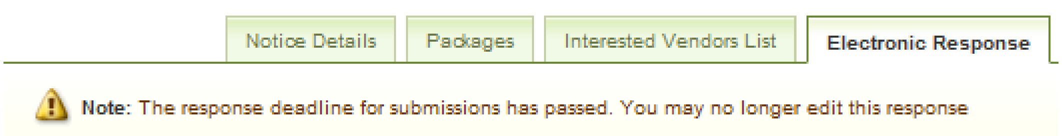
V. To review the response details, click on the blue "Click here" link in the note, or click on the blue "Review Response" link located at the top of the right side bar under the heading "My Electronic Submission."



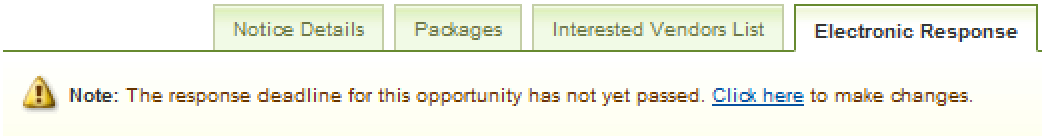


VI. After clicking on the "Click here" or "Review Response" link, the system will open the "Electronic Response" tab. Note, the right side bar will provide response information including the date and time that the response was created and modified, as well as the name of the submitter.

VII. If the response deadline has passed for the opportunity, the system will display the following message at the top of the "Electronic Response" tab indicating that the user may no longer edit the response. Note, the user will still be able to review their submitted response and at any time can return to the "Notice Details" tab by clicking on the "Return" button within the response.



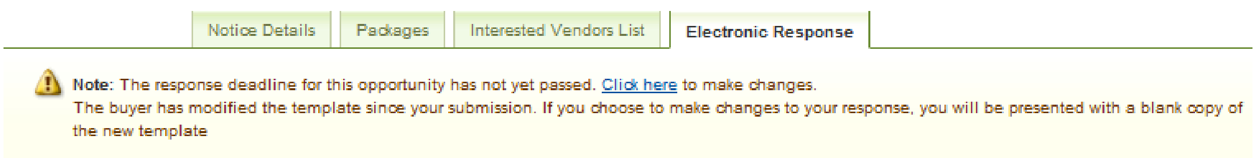
VIII. If the response deadline has not yet passed, the system will display the following note at the top of the "Electronic Response" tab indicating that the user can make changes to their response:



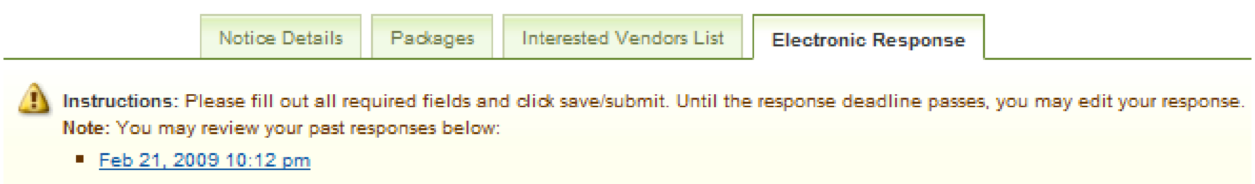
IX. To edit the response, click on the blue "Click here" link in the note. At this time, the user can edit the prices entered previously for any Line Item in the Line Item Builder. In addition, the user can review any documents previously uploaded, as well as delete and/or upload additional documents. There are two options on this page:
   a. The "Submit" button saves any changes made and submits the response to the opportunity. Note, the system will send an email to the email address on file for the user confirming the electronic submission;
   b. The "Return" button does not save any changes made and takes the user back to the "Notice Details" tab.

X. If the buyer modifies the Line Item (CLIN) Builder form after a user has submitted an electronic response, the system will send an email to the email address on file for the user alerting them that a change has been made.

XI. When the user reviews the response submitted for that opportunity, the system will display a message advising the user that changes were made to the form. If the user chooses to make changes to their response (note, changes can only be made if the response deadline has not yet passed), the system will provide a blank copy of the new form.



XII. If the user chooses to make changes and submit a new response, they must click on the blue "Click here" link in the note. The system will display the new form for the user to complete and submit if desired. The user can review their past responses by clicking on the blue link(s) in the note posted with the instructions.



4.4 Reviewing Packages associated with an Opportunity

I. Within an opportunity, on the "notice details" sub-tab, associated packages will show on the right under the heading "all files". If a "file" link in this list is clicked, the user is taken to the "packages" sub-tab for the opportunity.

II. Alternatively, the "packages" sub-tab could be clicked. On the "packages" sub-tab, the vendor will see the packages associated with an opportunity.

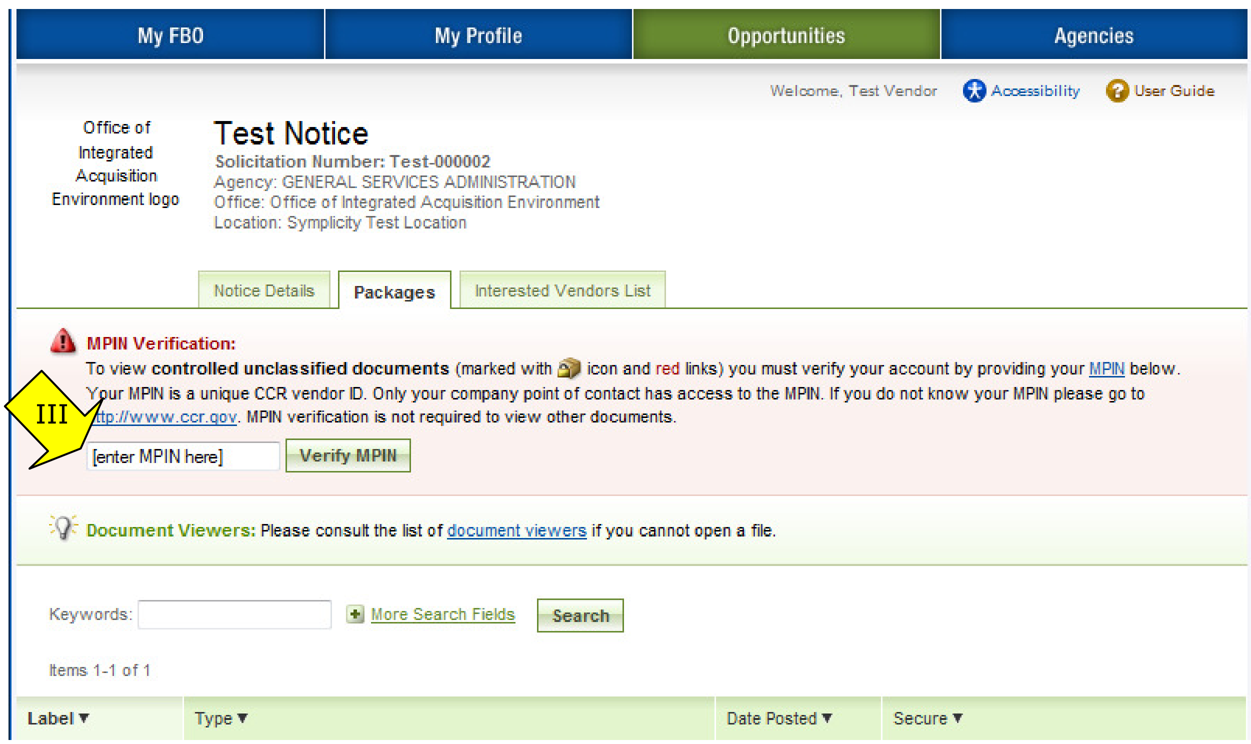

FedBizOpps.gov
Federal Business Opportunities
E-GOV
USA.gov
My FBO
My Profile
Opportunities
Agencies
Welcome, Alan Vendor
Accessibility
User Guide
Logout
New headquarters for the Dept. of Defence.
II
I
Notice Details
Packages
Interested Vendors List
Complete View
Original Synopsis
Presolicitation
Mar 24, 2008
Modification 1
Solicitation
Mar 25, 2008
Modification 2
Solicitation
Mar 25, 2008
Back
Add To Watchlist
Add Me To Interested Vendors
Solicitation Number:
123123456
Notice Type:
Solicitation
Synopsis:
Added: Mar 24, 2008 11:03 am
The Department of Defense requires new offices in Roslyn at 101 Wilson Blvd. The requirement is for 20 stories with 5000 occupants. Exterior must be smoked glass and steel.
Solicitation 01
Sensitive/Secure Package: no
Type: Solicitation
Solicitation 01
Mar 25, 2008
View File
Solicitation 02
Mar 25, 2008
View File
GENERAL INFORMATION
Notice Type:
Modification/Amendment/Cancel
Original Posted Date:
March 24, 2008
Posted Date:

4.5 View Controlled, Unclassified Document

I. To review a controlled, unclassified document (sensitive/secure), a user is required to have a valid MPIN (Marketing Partner Identification Number) entered in the system. The MPIN is part of the CCR profile for an entity.

II. Note: MPIN verification is saved and this step is only again required if the MPIN entered does not align with current data for a firm. If a previously entered MPIN becomes invalid, the system will prompt a vendor to enter a new MPIN and to verify the new value.

III. Enter MPIN if prompted.



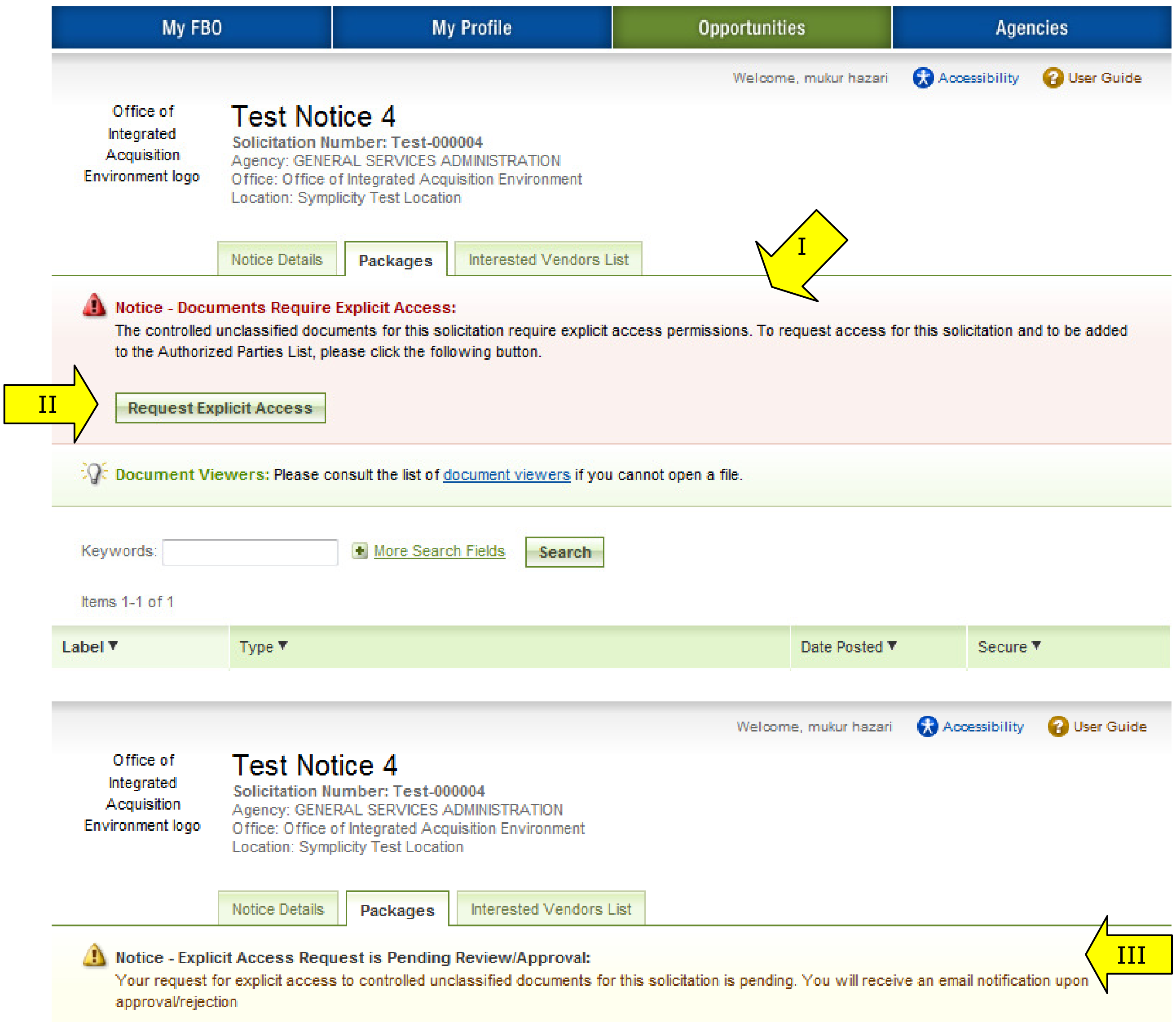
4.6 Request Explicit Access to View a Document

I. If a package requires explicit access, when the "packages" sub-tab is clicked, the vendor will see a warning indicating that the controlled, unclassified documents require "explicit access."

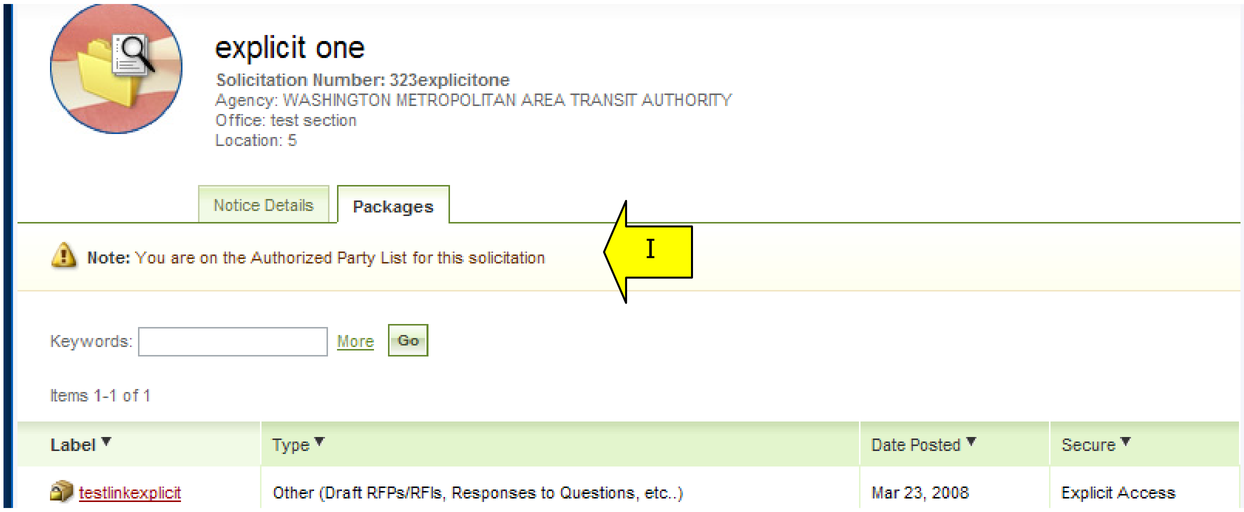
II. To request "explicit access" use the "request explicit access" button.

III. If a request for explicit access was previously submitted, and is pending review, the vendor will see designation that explicit access was previously requested.

IV. Vendors receive email notification once their request has been approved or rejected.



I. If a request for explicit access was previously submitted, and granted, the vendor will see designation that explicit access was granted.



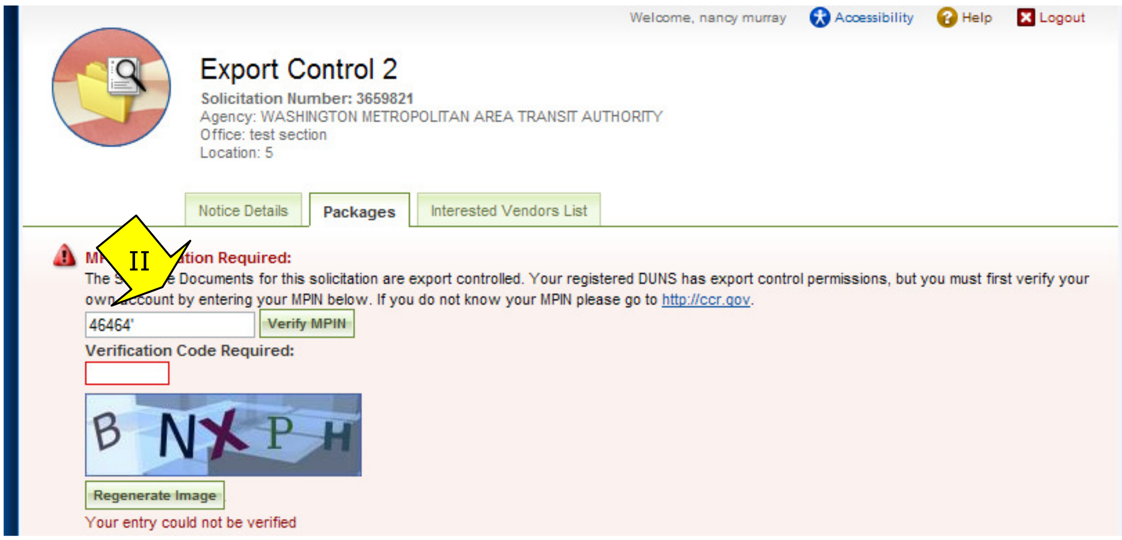
4.7 Viewing Export Controlled Documents

I. If a user tries to view a document that is export controlled, and the vendor is not authorized, the user will see an explanation of why they are not able to access the documents. No further action is allowed.

II. Vendors without export control authorization will only be able to review non-secure packages associated with an opportunity where any of the controlled, unclassified documents are export controlled.

I. If a vendor's firm is authorized to review export controlled documents, and if a valid MPIN is entered in the system, documents will be available for review.
II. If MPIN has not been verified for the user, the user will be prompted to enter an appropriate MPIN.
III. Note, MPIN verification will be saved and this step is only again required if the MPIN entered does not align with current data for a firm/office. If a previously entered MPIN becomes invalid, the system will prompt a vendor to enter a correct MPIN to verify the new value.

I. When a user (or machine) enters a MPIN 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 MPIN in order to attempt another submission. This prevents unauthorized access by spammers and other security threats.
III. Users can click on the image to hear the code.



4.8 Explicit Access and Export Controlled Documents

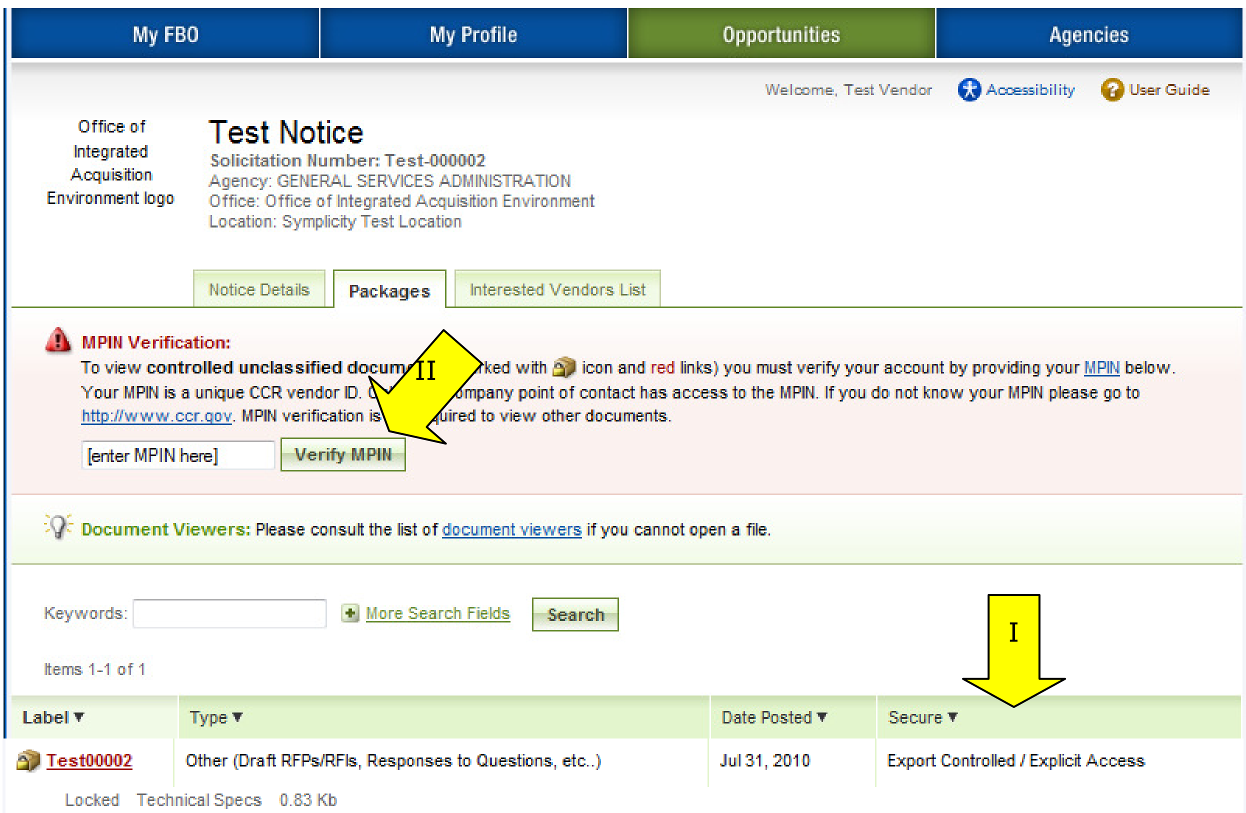
I. If both export control and explicit access document controls apply, both requirements will be listed in the "Secure" column.

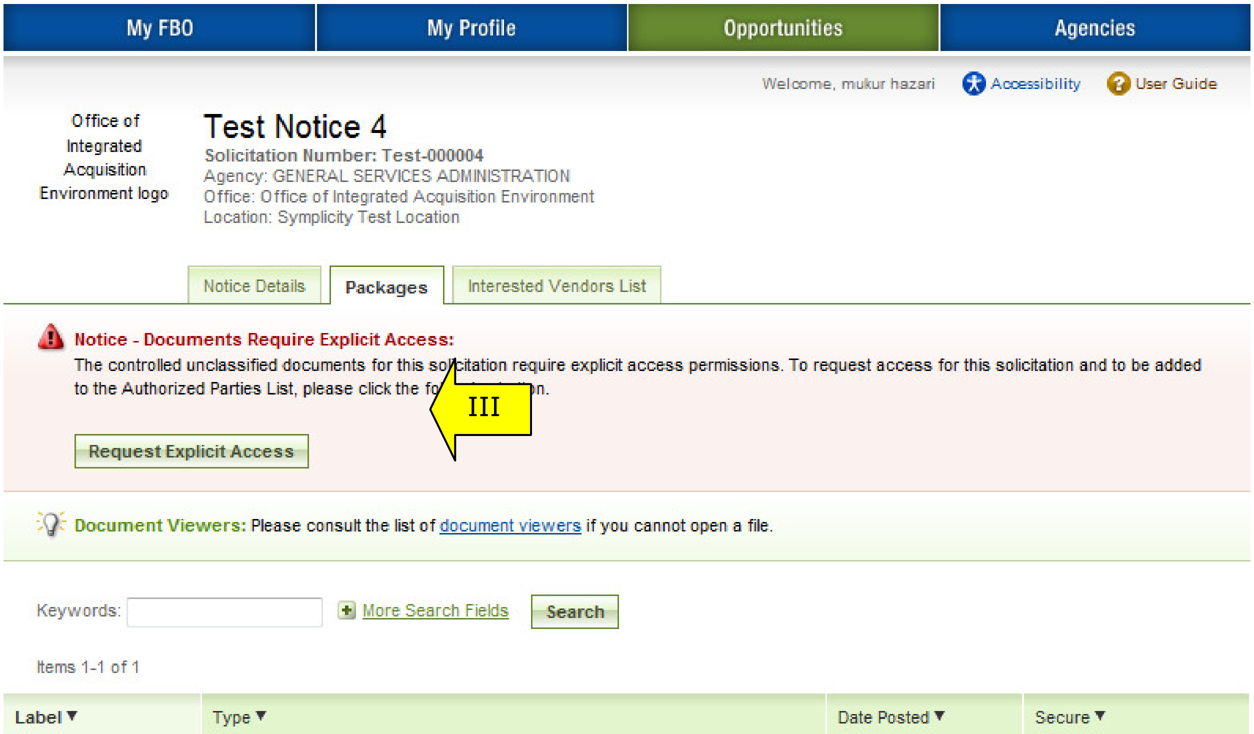
II. The vendor will need to first enter a valid MPIN (if not previously established in the system).Once MPIN is entered, click "verify MPIN"

III. Then the vendor will be given the option to request explicit access. To request "explicit access" use the "request explicit access" button.

IV. If a request for explicit access was previously submitted, and is pending review, the vendor will see designation that explicit access was previously requested.

V. If a request for explicit access was previously submitted, and granted, the vendor will see designation that explicit access was previously granted.




My FBO
My Profile
Opportunities
Agencies
Welcome, mukur hazari
Accessibility
User Guide
Office of Integrated Acquisition Environment logo
Test Notice 4
Solicitation Number: Test-000004
Agency: GENERAL SERVICES ADMINISTRATION
Office: Office of Integrated Acquisition Environment
Location: Symplicity Test Location
Notice Details
Packages
Interested Vendors List
Notice - Documents Require Explicit Access:
The controlled unclassified documents for this solicitation require explicit access permissions. To request access for this solicitation and to be added to the Authorized Parties List, please click the fo
n.
III
Request Explicit Access
Document Viewers: Please consult the list of document viewers if you cannot open a file.
Keywords:
More Search Fields
Search
Items 1-1 of 1
Label
Type
Date Posted
Secure

4.9 Interested Vendor List

I. The buyer for an opportunity will set whether or not an opportunity allows a vendor to indicate interest in a particular opportunity. If allowed, vendors will see an option to add themselves to the interested vendors list. If not allowed, the "add/remove me to the interested vendors" buttons will not display.

II. To be added to the interested vendor list, use the "Add Me To Interested Vendors" button.

I. If a vendor would like to be removed from the interested vendor list, use the "Remove Me From Interested Vendors" button.

I. The buyer for an opportunity will also establish whether an opportunity allows a vendor to review the list of other vendors that have indicated interest in a particular opportunity.
II. If allowed, the vendor will see the "Interested Vendors List" sub-tab when reviewing an opportunity. If viewing of other interested vendors is not allowed, this sub-tab will not display.
III. Use the "keywords" filter to search for a particular vendor in the list.

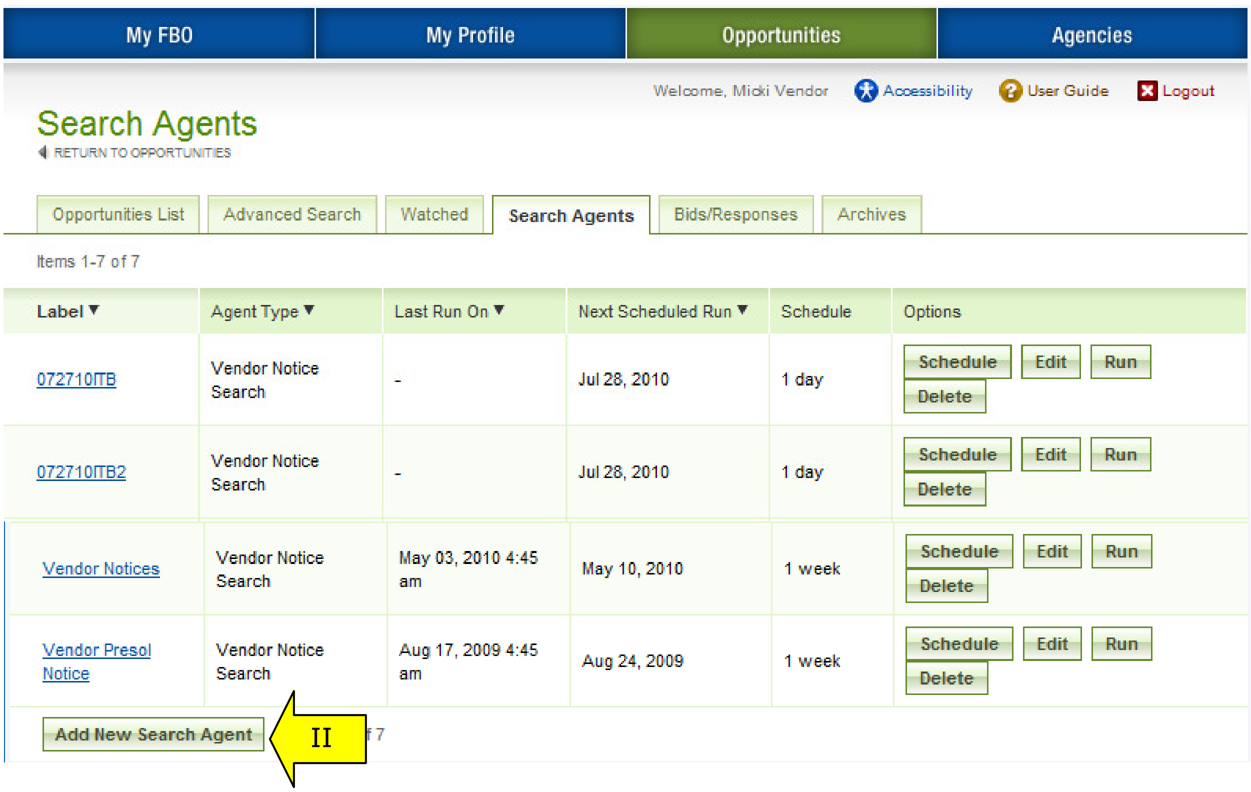
4.10 Search Agents

I. As previously discussed, the system allows vendors to search for opportunities based on a variety of search metrics. These searches, once created, can be useful tools for recurring use in the system. As such, advanced searches can be saved as "search agents" that can be scheduled for recurring exploration, or executed on an ad hoc basis.
II. To review/manage existing "search agents," go to the "Search Agents" sub-tab on the main navigation "Opportunities".
III. Each "search agent" will be listed in this list.
IV. Any search agent can be executed on ad hoc basis to generate search results (no email notification). Use the "run" button to execute the search basis. Results will display on the "Search Results" tab.
V. If a search agent has been scheduled for recurring execution, the "Schedule" column will indicate the frequency for the recurring schedule. A red "x" in the schedule column indicates that a search agent has not been enabled for recurring execution.
VI. Click on the "Schedule" button to edit frequency settings for the search agent.
VII. Click on the "edit" button to edit the search filters for the search agent.
VIII. Click on the "delete" button to delete the search agent.

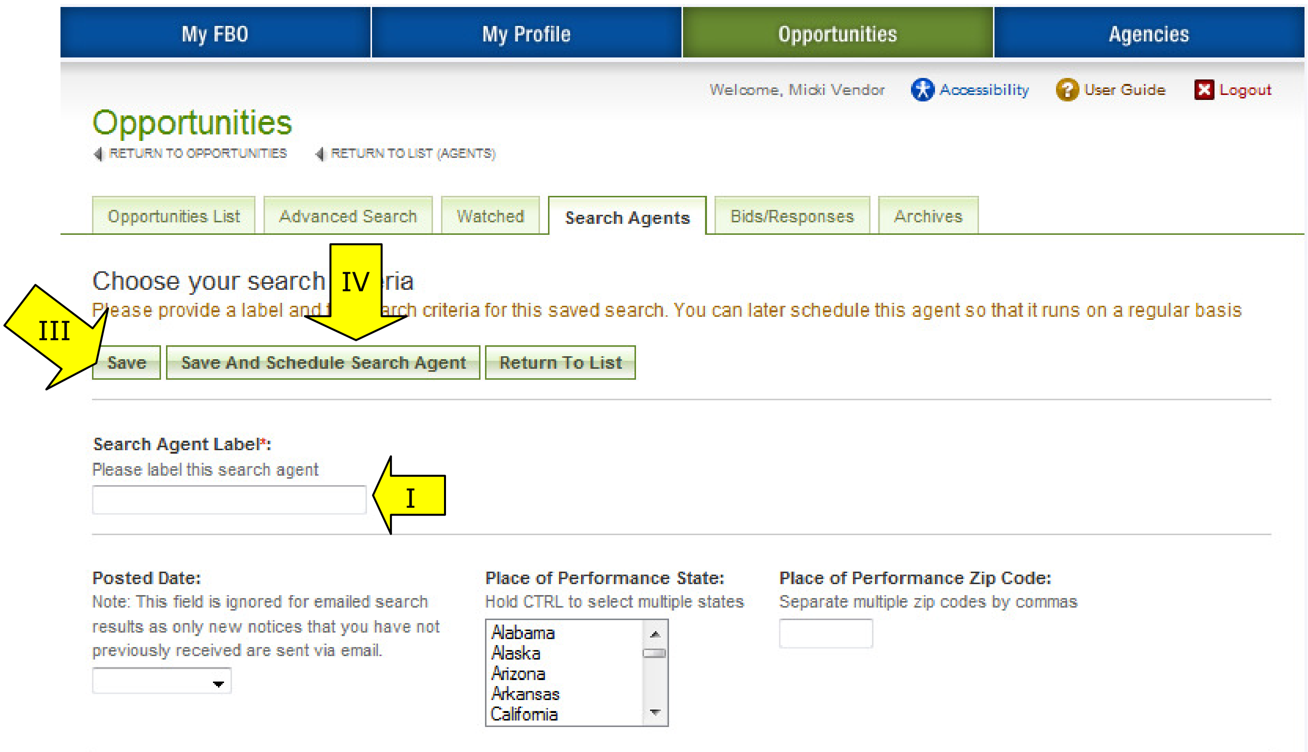
I. There are three ways to create a search agent.
   a. A user can navigate directly to the "Advanced Search" sub-tab to build a query specifically for the purpose of being a search agent by selecting the "Search and Create Saved Searches" Quicklink on the My FBO page.
   b. A user can click on the "Advanced Search" sub-tab within the Opportunities section and save a search for future use that is robust in terms of finding relevant opportunities.
   c. A user can navigate directly to the list of saved searches by selecting the "View Saved Searched" Quicklink on the My FBO page. From there, the user can click the "Add New Search Agent" button.

4.10.1 Creating a Search Agent from "Search Agents"

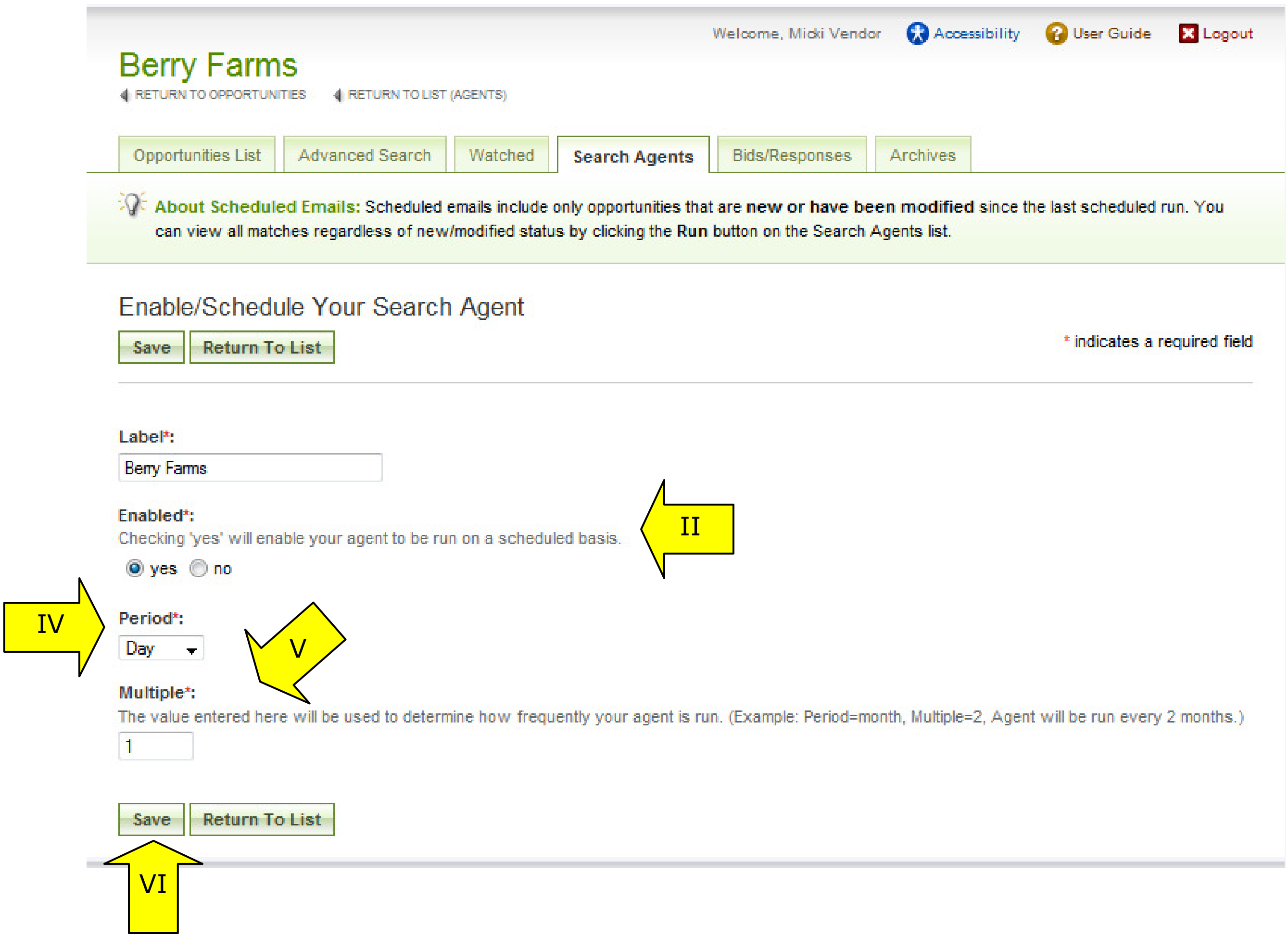
I. To create a search agent, go to the "Search Agents" sub-tab on the main navigation "Opportunities".
II. Select "Add New Search Agent" to add a new search agent.



I. Enter a “label” for the search agent.
II. Enter desired search agent search filters using the fields available on the form. Not all fields are shown in the screen shot below.
III. “Save”, saves the search agent, but does not “enable” the search agent to run on a recurring basis (see below).
IV. “Save And Schedule Search Agent,” should be used to enable the search agent and to set up a recurring schedule for running the agent.



I. "Save And Schedule Search Agent," if used, opens a form that allows the user to enable the search agent.
II. Vendors must enable a search agent to have it execute on a recurring basis.
III. If a search agent is set up to recur, vendors will receive email communication about search agent findings. When "enabled" is set to yes, the "Period" and "Multiple" fields will appear.
IV. "Period" sets the frequency that the search agent will execute. Search agents can be set up to run daily, weekly, or monthly.
V. "Multiple" establishes the frequency for the "period." So to run a search agent every third day, the period should be set to "day" and the multiple should be set to "3."
VI. Hit "Save" to save your settings.

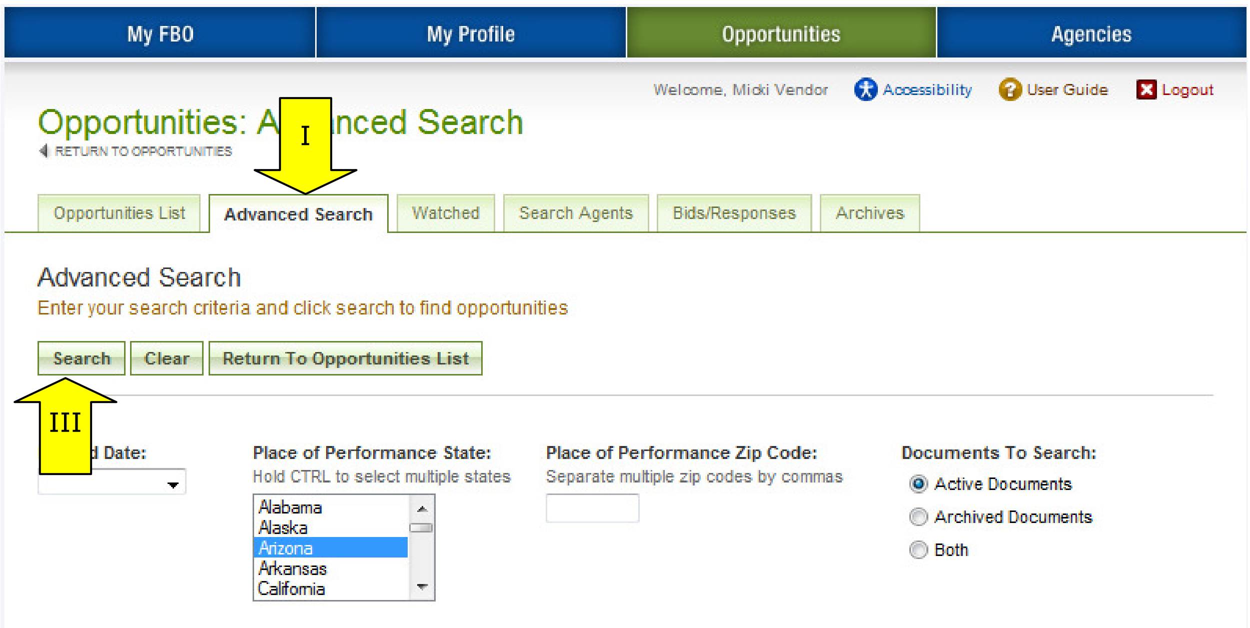


4.10.2 Creating a Search Agent from an Advanced Search

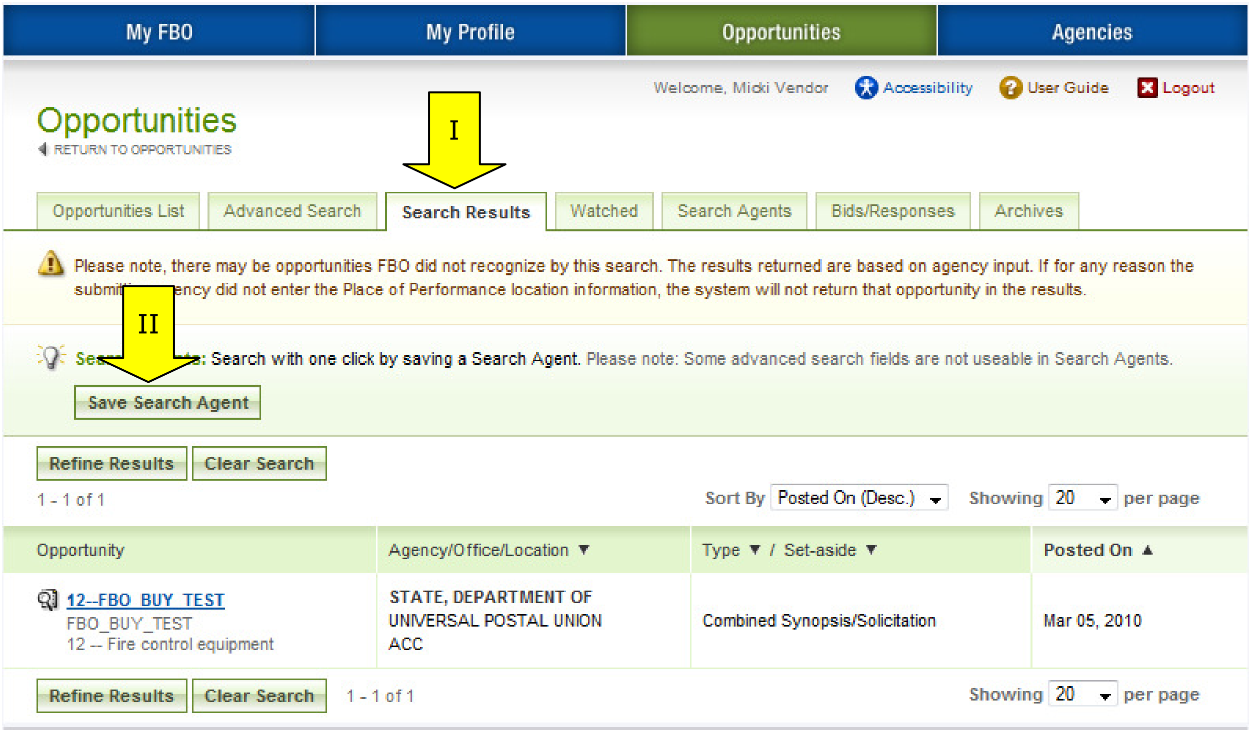
I. To initiate an "Advanced Search", go to the "Advanced Search" sub-tab on the main navigation "Opportunities".

II. Enter the search filter criteria for your search. Note not all search filters are shown below in the screen shot.

III. Select "search" button when filters have been set (not all filter options are shown in screen shot below because of the length of the form).

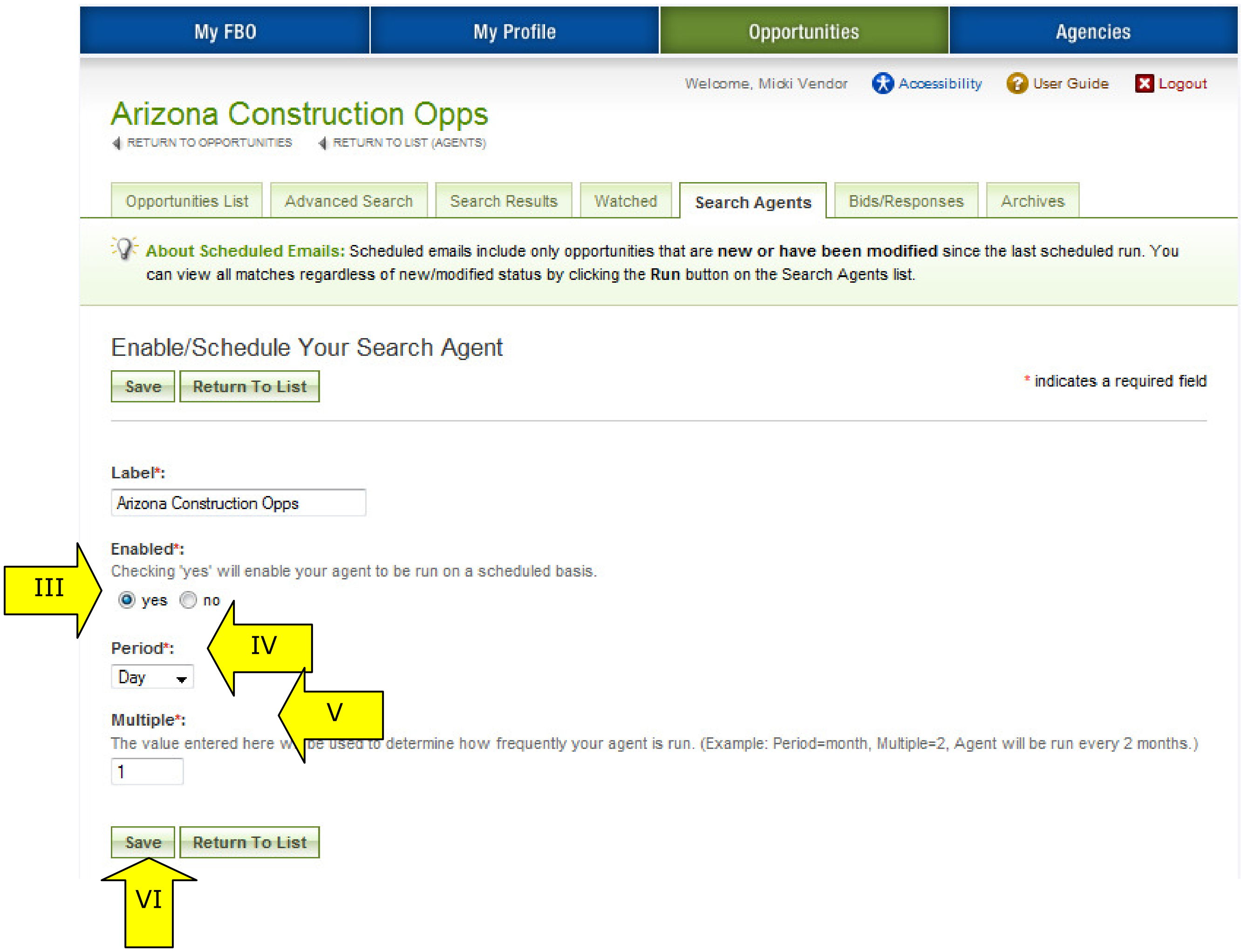


I. Search results will appear on the "Search Results" sub-tab.
II. If a vendor wants to save the settings used in the search, use the "Save Search Agent" button.



I. This opens the "search agent" sub-tab for opportunities.
II. Enter a "label" for the search agent.
III. "Save", saves the search agent, but does not enable the search agent.
IV. "Save And Schedule Search Agent," should be used to enable the search agent and to set up a recurring schedule for the search agent.

I. "Save And Schedule Search Agent," if used, opens a form that allows the user to enable the search agent. Vendors must enable a search agent to have it execute on a recurring basis.
II. If a search agent is set up to recur, vendors will receive email communication about search agent findings.
III. When "enabled" is set to yes, the "Period" and "Multiple" fields will appear.
IV. "Period" sets the frequency that the search agent will execute. Search agents can be set up to run daily, weekly, or monthly.
V. "Multiple" establishes the frequency for the "period." So to run a search agent every third day, the period should be set to "day" and the multiple should be set to "3."
VI. Hit "Save" to save your settings.



4.10.3 Search Agent Emails

I. Search agent emails highlight those notices that were either newly added, or modified, since the last search agent email was sent. If a search agent is slated to run daily, the email will list those notices that fall into the search criteria, and that were either newly added, or modified, since the last email was sent to you (in this example, in the past day).

II. Search agents can be set up to find notices that meet a specific set of criteria. The search agent criteria may, or may not, include filtering for the date posted. When a search agent is "run" on the system, "run" results will include all notices meeting that search agent criteria. If the search agent is "enabled", and "scheduled" on a periodic basis, the search agent email lists only notices that meet the criteria and that were added or modified since the last email was sent. So "run" results for a search agent, and the search agent email listing of notices on a particular day, will potentially differ - although both are correct.

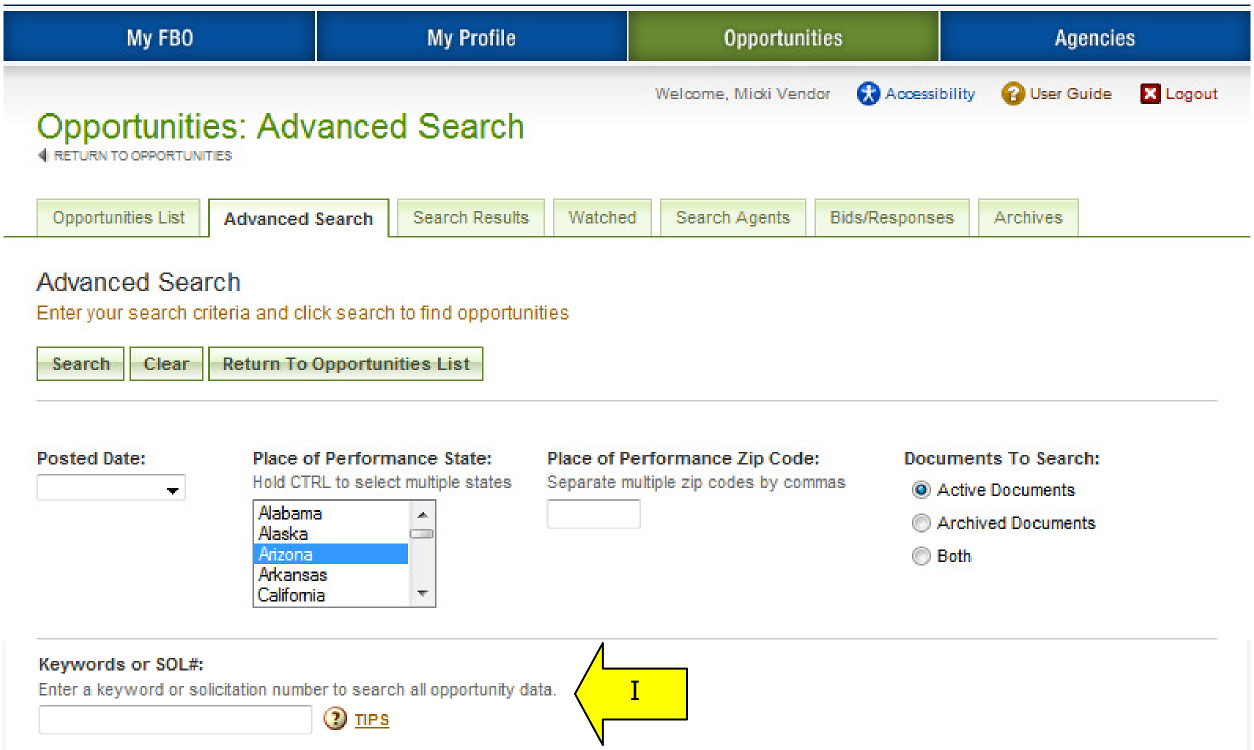
III. You can click on the presented solicitation link to navigate directly to a notice of interest.

Sample Email Image:

```
Monday, July 26, 2010, 04:45 am

Dear Micki:

Your FBO Opportunity Search Agent called: 'Vendor Notices' has identified the following
opportunities that have either been newly posted or modified and match your search criteria.

        Title:                  DRY CLEAN TABLE CLOTHS
        Sol. #:                 HARRIS-F2M311702404-DCTC-10023
        Agency:                 DEPT OF THE AIR FORCE
        Office:                 AETC
        Location:               345th Contracting Training Flight
        Posted On:              Jul 23, 2010 4:25 pm
        Base Type:              Presolicitation
        Link:
https://fbo-test.symplicity.com/notices/5c085d452808e4d345ae8eb952ba6cdc

        -------------------------------------------------------

        Title:                  Dry Clean table cloths
        Sol. #:                 chapman-F2M311702402-DRY-10023
        Agency:                 DEPT OF THE AIR FORCE
        Office:                 AETC
        Location:               345th Contracting Training Flight
        Posted On:              Jul 23, 2010 4:22 pm
        Base Type:              Presolicitation
        Link:
https://fbo-test.symplicity.com/notices/b2064e42528df87ce8a2f0be12c2a0c8

        -------------------------------------------------------
```

4.11 Search Field Tips

I. When you are entering a search item (for instance data in a keyword search field), search engine resources are available.



Sample Searches

These illustrate the use of search terms and phrases, Boolean operators, grouping, wildcards, and proximity searches.

- space AND flight
  Finds notices containing with the words "space" and "flight".
- "space flight"~10
  Finds notices containing the words "space" and "flight" within 10 words of each other (proximity search).
- database AND mysql NOT oracle
  Finds notices containing the words "database" and "mysql", but not "oracle".
- micro* AND circuitry
  Finds notices containing both words that begin with "micro" and the word "circuitry".
- "office supplies" AND (printer OR toner)
  Finds notices containing the phrase "office supplies" in addition to either of "printer" or "toner".
- +space flight
  Finds notices with the word "space" which may or may not contain the word "flight".

Search Terms and Phrases

When you are entering a search item (for instance data in a keyword search field), you will want to think of your search as being comprised of two components: terms and operators.

There are two types of terms: Single Terms and Phrases:

- A Single Term is a single word such as *test* or *hello*.
- A Phrase is a group of words surrounded by double quotes such as *"bath tub"*. Multiple terms can be combined together with Boolean operators to form a more complex query.

Boolean Operators and Grouping

Boolean operators allow terms to be combined through logic operators. FBO supports AND, OR, NOT, "+", and "-" as Boolean operators.

Note: Boolean operators AND, OR, NOT must be in ALL CAPS otherwise they are interpreted as search terms.

- The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. This is equivalent to a union of sets. The symbol "||" can be used in place of the word OR.
- To search for items that contain either of *jakarta*, *apache* or just *jakarta* use the query: *jakarta apache*.
- The AND operator finds results where both terms exist anywhere in the text of an item. This is equivalent to an intersection using sets. The symbol can be used in place of the word AND. To search for documents that contain *jakartaapache* and *Apache Lucene* use the query: *"jakarta apache" AND "Apache Lucene"*
- The "+" or required operator requires that the term after the "+" symbol exist somewhere in a field of an item. To search for documents that must contain *jakarta* and may contain *lucene* use the query: *+jakarta lucene*
- The NOT operator excludes items that contain the term after NOT. This is equivalent to a difference using sets. The symbol '!' can be used in place of the word NOT. To search for items that contain *jakarta* but not *Apache Lucene* use the query: *jakarta NOT "Apache Lucene".* Note: The NOT operator cannot be used with just one term. For example, the following search will return no results: *NOT "jakarta apache"*
- The "-" or prohibit operator excludes items that contain the term after the "-" symbol. To search for items that contain *jakarta apache* but not *Apache Lucene* use the query: *"jakarta apache" -"Apache Lucene"*
- **Grouping** - The system supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query. To search for either *jakarta* or *apache* and *website* use the query*: (jakarta OR apache) AND website*. This makes sure *website* exists and either term *jakarta* or *apache* may exist in the result.

Term Modifier Operators (Wildcard, Fuzzy, Proximity)

FBO supports modifying query terms to provide a wide range of searching options:

- **Wildcard Searches** - FBO supports single and multiple character wildcard searches within single terms (not within phrase queries). To perform a single character wildcard search use the *?* symbol. To perform a multiple character wildcard search use the * symbol. The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for *text* or *test*, you can use the search: *te?t*. Multiple character wildcard searches looks for zero or more characters. For example, to search for *test, tests* or *tester*, you can use the search: *test**. You can also use the wildcard searches in the middle of a term: *te*t*. Note: You cannot use a * or ? symbol as the first character of a search.
- **Fuzzy Searches** - FBO supports fuzzy searches based on the Levenshtein Distance, or Edit Distance algorithm. To do a fuzzy search use the tilde, ~, symbol at the end of a single word term. For example to search for a term similar in spelling to *roam* use the fuzzy search: *roam~*. This search will find terms like *foam* and *roams*. An additional parameter can specify the required similarity. The value is between 0 and 1, with a value closer to 1 only terms with a higher similarity will be matched. Similarity is defined as by the minimum number of operations needed to transform one string into the other, where an operation is an insertion, deletion, or substitution of a single character. For example: roam~0.8. The default that is used if the parameter is not given is 0.5.
- **Proximity Searches** - FBO supports finding words that are within a specific distance away from each other in a data set. To do a proximity search use the tilde, "~", symbol at the end of a Phrase. For example to search for a *apache* and *jakarta* within 10 words of each other in a document use the search: *"jakarta apache"~10*

FBO Uses the Lucene search engine and this documentation is adapted from the official Lucene query syntax document, with portions Copyright © 2006 The Apache Software Foundation.

4.12 Watched List

I. Vendors can add opportunities to a “watched list” list (a la “favorites” list). This allows for ease in referencing targeted opportunities. Additionally, vendors receive email updates about opportunities on their Watched List.
II. To review/manage existing “watched list” opportunities, go to the “Watched” sub-tab on the main navigation “Opportunities”.
III. Each “opportunity” on the watched list will be listed.
IV. Click on the “Remove” button to remove an opportunity from the watched list.
V. Use “keywords” search tool to look for a specific opportunity on the watched list.
VI. Click on the “notice” link to go to “notice details”
VII. Click on the agency/office name to go to the agency/office profile tab.