

# FBO.GOV Buyer User Guide 1.9

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# 1 System Overview

The system is a web-based portal which allows vendors to review Federal Procurement Opportunities over \$25,000.

**All Users:** From the site's main navigation page, any user (not password protected) can utilize navigation to review:

- Getting Started Training Materials
- General Information
- Opportunities
- Agencies / Offices List
- Privacy Statement

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

- **Buyers:** Possess key system functionality as outlined below:
  - Maintain Buyer Profile. Buyers can be set up to be agency, or specific contracting office, buyers.
  - Create, Modify/Amend, or Cancel an Opportunity Notice.
  - Manage document package content, and vendor accessibility to package documents, that support opportunities. Buyers can upload non-sensitive documents (and attach existing controlled, unclassified documents to notices)
  - Receive and electronically evaluate vendor proposals, quotes, and information (if the Agency/Office Location Administrator enables the Bid Module functionality for the Buyer's registered location).
  - Buyers can create non-FBO solicitation links. These links create document packages that are not tied to FBO solicitations (parallels functionality previously found in the FedTeDS system). With this feature, the buyer is able to create a clickable link that can be used in other systems/documents. When clicked by a vendor, the vendor is taken to a system interface where their authorization to review materials (explicit access / export controlled) is vetted prior to letting the vendor access the materials.
- **Engineers:** This user group can post / update controlled, unclassified documents for use as attachments to Opportunities. Engineers, unless also designated to be a buyer, cannot post or manage opportunities. **NOTE:** Every user is registered for a particular agency/office and usually location, which includes engineers. Buyers of the same office will see unattached technical packages when posting notices for attachment. Buyers can also search by PR#, a technical package field, to find packages submitted for any office that is unattached, but a user must know the PR# to find it.
- **Buyer/Engineer:** A user can be given both Buyer and Engineer user rights. This allows a single user to both post controlled, unclassified documents and to create solicitations.
- **Location Administrators:** Users that have the authority to authorize an agency's staff member as being able to post opportunities in the system. Location Administrators are able to post opportunities for their agency and also have the ability to enable or disable the Bid Module functionality for their users
- **Super User:** Users with system oversight and administrative rights.

**Vendors**, when logged in using their password protected account can do the following:

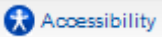

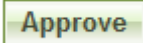
- Vendor Profile: Vendors maintain profiles in the system, streamlining use of the portal. Among other profile elements, the following key vendor information is maintained in their profile:
  - DUNS (Data Universal Numbering System) Number
  - Commercial and Government Entity (CAGE) Code
  - MPIN (Marketing Partner Identification Number) – Optional profile field required to view controlled, unclassified materials.
- Vendor Opportunity Review Features: Vendors can search for opportunities based on the following terms:
  - Keyword or Solicitation Number
  - Opportunity/Procurement Type
  - Posted Date
  - Response Deadline
  - Last Modified Date
  - Contract Award Date
  - Place of Performance Zip Code
  - Place of Performance State
  - Set-Aside Code (set-aside solicitations allow only specified business concerns)
  - Classification Code
  - NAICS (North American Industry Classification System) Code
  - Agency/Office/Location(s)
  - Recovery and Reinvestment Act Action
  - J&A Statutory Authority


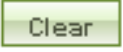



Vendor can set up search agents based on detailed search elements which highlight newly added opportunities aligning with their search criteria. Vendors can add opportunities to a watched list (akin to a favorites list). Per the vendor's profile status, a vendor can review documents associated with the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


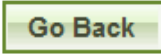





- Opportunity Actions: Vendors are able to add themselves to the Interested Vendors List (IVL) for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors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




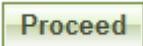
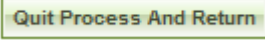

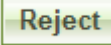





## 1.1 Definition of key terms

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




Term	Icon	Description
Accessibility	 or 	Accessibility Mode – Disables select interface enhancements to ensure users of assistive technologies have full and equal access to all aspects of this web site. Icon is red if accessibility mode is on or blue if accessibility mode is off.
Account	n/a	From an account, a user is designated as a representative for a particular agency or office. Because some users are associated with multiple agencies/offices, they will have multiple accounts tied to their username.
Active Notice	n/a	Notice that is open for vendor review/response.
Approve		The Approve button is used to approve a vendor's request for explicit access to controlled, unclassified documents.
Audit Trail	n/a	For controlled, unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the audit trail sub-tab of a released document.
Authorized Party	n/a	Certain controlled, unclassified package(s) require that a vendor be explicitly authorized to review the materials. A government user can pro-actively select a vendor user for access, or a vendor can request, and be granted access, through this system. Once the vendor is given explicit access to review the package, they are an authorized party.
Authorized Vendor	n/a	Export Controlled access level requires that the vendor's company be certified by the DLA 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	n/a	If enabled by the buyer, the Bid Module feature allows for the electronic submission and evaluation of vendor responses to notices.
Buyer	n/a	Government user that is presenting an opportunity notice in the system.
CAGE Code	n/a	Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies companies doing, or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second,

		third and fourth may be any mixture of alpha/numeric excluding I and O. All positions are non-significant. The code provides for a standardized method of identifying a given facility at a specific location.
Cancel Notice		Notice that has been cancelled. Does not go to archives until archive date for the notice.
Clear		The Clear button appears when a user is using search filters. If selected, the system clears any previously entered search filters.
CLIN	n/a	Buyers may enable an online Item (CLIN) builder which will serve as a template for the items that vendors will be requested to quote on; buyers may utilize the Item (CLIN) Builder in conjunction with requesting electronic submission of proposals as well.
Create Award Document		Add designation of the contract award recipient. Document is a single attachment (either link or uploaded document) that can be attached to a Notice. A collection of documents can be bundled to create a Package
Doc Package	n/a	If enabled by the buyer, vendors can submit an electronic response to notices in the form of document (file) uploads.
Document	n/a	Document is a single attachment (either link or uploaded document) that can be attached to a Notice. A collection of documents can be bundled to create a Package
Draft		Saved, but not necessarily complete. Drafts are not viewable on vendor interface.
DUNS	n/a	DUNS (Data Universal Numbering System) Number - According to the FAR 4.11, prospective vendors must be registered in SAM (System for Award Management) 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 SAM, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
Edit		Open record for edits.
Electronic Submissions	n/a	If the Bid Module is enabled by the Buyer, vendors can submit electronic responses to notices called Electronic Submissions which can be a CLIN form and/or a doc package.
Engineer	n/a	User that can post/update controlled, unclassified documents for use as attachments to Opportunities. Engineers are registered for a particular agency/office and usually location. Buyers of the same office will see unattached technical packages

		when posting notices for attachment.
Explicit Access	n/a	Vendor is given explicit access to review controlled, unclassified package(s). A government user can 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 access level requires that the vendor's company be certified by the DLA Logistics Information Service's Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's CAGE code/MPIN.
Form	n/a	Any screen where a user enters data that is saved in the system.
Go		If data is entered in keyword search filter, select the Go button to submit the request.
Go Back		During a stepwise process, use of the go back button takes the user back one step in the process.
Help	 or 	Throughout the system, the system presents users with the opportunity review system Help messages. The icons presented here will take the users to the help message that is available.
Interested Vendor	n/a	If a notice is set to allow for either of these features (note the features are set by the buyer), vendors will be allowed to do the following: 1) indicate interest in a particular notice, 2) review the listing of interested vendors for a notice (i.e., list of targets for potential collaboration). <i>Note: The Interested Vendor list is only available to those with FBO accounts. Agency buyers / engineers will need to go to the FBO homepage and login in order to view.</i>
Log-in		Use username and password to logon to an account on the system
Logout		The Logout button can be used to log the user off the system.
Modify/Amend		Edit or amend a notice.
MPIN	n/a	Marketing Partner Identification Number. Export Controlled access level requires that the vendor's company be certified by the DLA Logistics Information Service's Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's DUNS/MPIN.

Non-FBO Solicitation	n/a	Buyers can create links to controlled, unclassified documents posted in the FBO system for viewing outside the context of FBO notices. Non-FBO solicitations, when released in the system, support a link (URL) to the Non-FBO solicitation's controlled, unclassified, document packages. The Non-FBO link can be used in other systems, or documents, and when clicked by a vendor will link the vendor to the Non-FBO materials. The system controls vendor access (e.g., explicit access, export control) to the Non-FBO solicitation in the same manner as it does for a FBO solicitation. Non-FBO links were previously managed through FedTeDS.
Package		Collection of documents that can be attached to a notice.
Paste Plain Text		When entering description field for Solicitation, users can use this paste plain text tool to open pop-up that allows for plain text insertion into the field.
Post		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).
Switch Accounts		Because some buyers are associated with multiple agencies/offices, they will have multiple accounts tied to their username. Users having multiple associations can switch between accounts by using the switch account tool
Username	n/a	All users will have one username. The username is used to log into the system.
Vendor	n/a	Provider of services.
Watched List		Designation that vendor can set on a notice that saves the notice on a sub-tab list of notices. The watched list is easily accessed with a quick .

## 2 Logging onto the System

### 2.1 System URL

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

### 2.2 Navigation Bar on Logon Page – Unsecured features

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

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



## 2.3 Register for an Account

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

- I. To get started, go to [www.FBO.gov](http://www.FBO.gov) and click on the Register Now link located in the Buyers / Engineers section. This will open up a series of screens where the user enters registration data.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. Below this is a search area with a magnifying glass icon and the text "Search more than 33,300\* active federal opportunities." The search filters include: Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), Type (Any), Keyword / Solicitation #, and Agency. A "Search" button is present. Below the search area is an "ATTENTION" message regarding document uploads. The main content area is divided into two columns: "Buyers / Engineers" and "Vendors / Citizens". Each column has a "Login" button and links for "View Opportunities", "Register Now", "Password Reminder", and "Recovery FAQs". On the right side, there is a "RECOVERY" section with buttons for "SEARCH RECOVERY OPPORTUNITIES" and "SEARCH RECOVERY AWARDS", and a "SMALL BUSINESS EVENTS" section with a "SEARCH SMALL BUSINESS EVENTS" button. At the bottom right, there is a "VENDOR COLLABORATION" section with a "VENDOR COLLABORATION" button and a "USER GUIDES" section with links for Buyer, Vendor, Engineer, and Location / Agency Admin.

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

Home Getting Started General Info Opportunities Agencies Privacy

Accessibility

## Buyer/Engineer Registration

RETURN TO HOME

- 1 Personal Information
- 2 Account Information
- 3 Review/Submit

### FedBizOpps (FBO) Registration Form for Federal Users

\* indicates a required field

Before an individual user can register to use FBO, his or her Agency must be registered with FBO. Please contact the FBO Helpdesk for Agency Registration

**Your Full Name\*:**  
Please enter your full name.  
Example: John F. Smith

**Your Suffix:**  
If applicable, enter your suffix.

**The Title of Your Position:**  
Enter the title of the position you hold at your agency.

**Your Email Address\*:**  
Enter your email address.  
Example: john@agency.gov

**Phone\*:**  
Enter your phone number

Cancel Proceed

- I. Step two – Account Information is entered - Agency / Office is set up, along with password creation. When you enter a desired password, for security purposes, the password must meet the following criteria:
  - Must be between 8 and 14 characters
  - Must contain 1 of each of the following:
    - lower case letter
    - upper case letter
    - number
    - special character (e.g. !, %, ^)
- II. During account registration, buyers can register to be a buyer, engineer or both buyer and engineer. Registering as both allows a single user to both create controlled, unclassified documents and to manage opportunities.
- III. Once required fields are entered, select proceed and review.

### Buyer/Engineer Registration

- 1 Personal Information
- 2 Account Information
- 3 Review/Submit

**On this step:** Please choose your agency/office location and choose an account password

#### Account Information \* indicates a required field

**Agency\*:**  
 Choose your agency down to the lowest level

**User Role(s)\*:**

- **Buyers:** Create, Modify/Amend, or Cancel Opportunity Notices. They manage document package content, and vendor accessibility to package documents, that support opportunities. Buyers can upload non-sensitive docs (and attach existing sensitive, but unclassified docs to notices). Buyers can also create non-fbo solicitation links.
- **Engineers:** This user group can post / update sensitive, but unclassified packages for use as attachments to Opportunities.
- **Buyer/Engineer:** A single user can be given both Buyer and Engineer user rights. This allows a single user to both post secured, but unclassified packages and to create solicitations.
- **Office Location Administrators:** Users that authorize an office location's staff as either buyer / engineer. Office Location administrators are also able to post opportunities, and sensitive, but unclassified packages, for their location.

Buyer  Engineer  Office Location Administrator

**Username\*:**  
 Please choose your login username now


**Desired Password\*:**  
 Enter the password you wish to use to gain access to the system.  
 For security purposes, the password must meet the following criteria:

1. Must be between 8 and 14 characters
2. Must contain **all of the following:**
  - 1 lower case letters
  - 1 upper case letters
  - 1 numbers
  - 1 special characters (e.g. !, %, ^)

**Repeat Desired Password\*:**  
 Repeat the password you entered in the previous field to verify it was entered correctly.

- I. Step three – Review/Submit - Registrant is asked to review registration information.
- II. Click go back to correct information on previous steps.
- III. If everything is correct, click submit at the bottom of the page.

- 1 Personal Information
- 2 Account Information
- 3 Review/Submit

 **On this step:** Please review your registration information. If everything is correct, click **Submit Registration** now. Otherwise, click **Go Back** to correct information on previous steps.

### FedBizOpps (FBO) Registration Form for Federal Users

Your Full Name:  
nancy

Your Suffix:  
n

The Title of Your Position:  
n

Your Email Address:  
[n@simplicity.com](mailto:n@simplicity.com)

#### Account Information

Agency:  
AGENCY FOR INTERNATIONAL DEVELOPMENT

**Note:** You have selected the top level of this agency hierarchy.

Contracting Office (Enter Manually):  
test

User Role(s):  
Engineer

Username:  
testeng

Desired Password:  
\*\*\*\*\*

Repeat Desired Password:  
\*\*\*\*\*

- 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 header with navigation tabs: Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. The main content area is titled "Buyer Registration" and includes a "RETURN TO HOME" link. A progress indicator on the left shows three steps: 1. Personal Information, 2. Account Information, and 3. Review/Submit. The current step is "Final Step: Email Verification", which includes an envelope icon and the following 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](#)." An "Accessibility" link is visible in the top right corner.

- II. Once the buyer has completed the steps outlined in the email, the registrant's account must now wait for administrator approval prior to being able to logon to the system.
- III. Once approved, newly registered buyers will be sent a confirmation e-mail. Once that approval is received, a new user may login to the system.

## 2.4 Returning Users – Log into the system

- I. Point your browser to <https://www.FBO.gov> and enter username and password.
- II. Click Login button.

The screenshot shows the FBO website interface. At the top, there is a navigation bar with links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. Below this is a search section with a magnifying glass icon and the text "Search more than 200\* active federal opportunities." The search filters include "Posted Date" (Last 90 Days), "Set-Aside Code" (Any), "Place of Performance" (Any State or Territory), "Type" (Any), "Keyword / Solicitation #", and "Agency". A "Search" button is present, along with a link to an "advanced search form".

On the right side, there is a "RECOVERY" section with a search button for "RECOVERY OPPORTUNITIES" and "RECOVERY AWARDS". Below this is a "FBO RECOVERY REPORTS" section with links for "Opportunities" and "Awards".

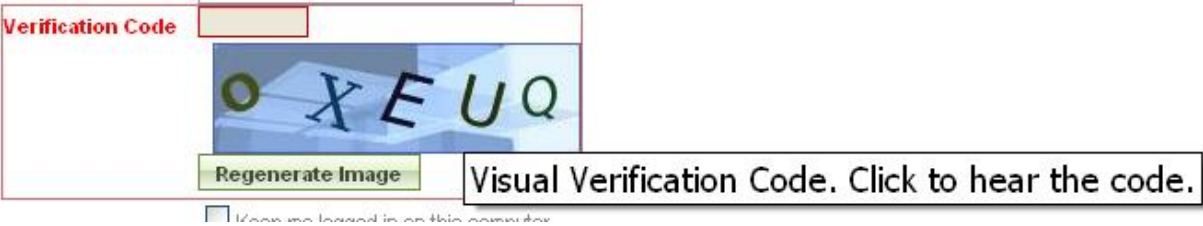
Below the search section, there is a "USER GUIDES" section with links for "Buyer", "Vendor", "Engineer", and "Location / Agency Admin". A note mentions "Use Adobe Acrobat Reader to view files in PDF format." Below that is a "DEMONSTRATION VIDEOS" section with a "Watch the Videos" link.

At the bottom, there are two main sections: "Buyers / Engineers" and "Vendors / Citizens". The "Buyers / Engineers" section includes a "View Opportunities" link, a note that "No login is required to view opportunities", and links for "Register Now", "Password Reminder", and "Recovery FAQs". The "Vendors / Citizens" section includes a "Find Opportunities" link, a note that "No login is required to view opportunities", and links for "Register Now", "Password Reminder", and "Recovery FAQs".



### 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 such interception, monitoring, reading, capturing, recording, disclosure, copying, auditing, and/or inspection at the discretion of authorized FBO personnel. law

## 3 Buyer's Secured Interface

### 3.1 session time out

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

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

### 3.2 Main Navigation

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

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



### 3.2.1 My FBO

The My FBO page allows for easy access to the following system features:

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


The screenshot shows the 'My FBO' dashboard with the following sections:

- Video Demonstrations** (NEW): A note that the Adobe Flash plugin is required. A list of links includes: FBO Train-the-Trainer: Finding Opportunities, Managing FBO Notices, Managing Non-FBO Notices, Receiving Notice Notifications: Search Agents & Watch Lists, and Engineer Interface.
- Pending Actions**: Shows 1 Explicit Access Request.
- Quicklinks**: A list of actions: Edit Draft Notice, Create Notice, Mod/Amend Notice, Create Award, Cancel Notice, and Upload New Documents/Links.
- Statistics**: Shows 115 Active Procurement Notices and 60 Archived Procurement Notices.
- Account Switcher**: A section for switching office/agency accounts. It includes a dropdown menu currently set to 'Office of Integrated Acquisition Environment Symplcity Test Location' and a tip to click the user icon to switch accounts.
- Announcements**: A message stating 'There are no announcements at this time.'

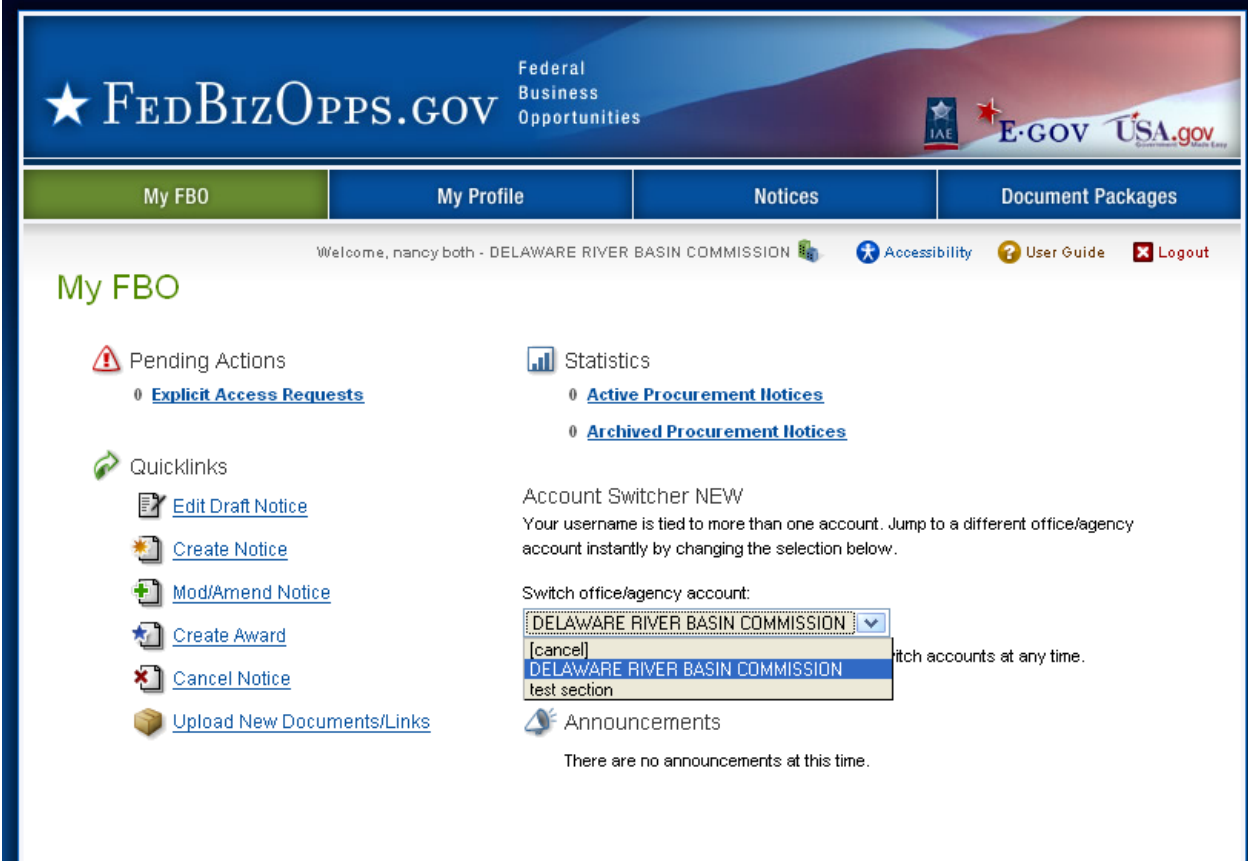
### 3.2.2 Multi-account Users

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



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

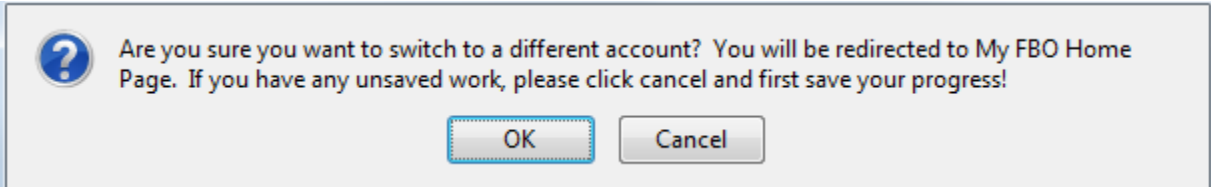
Home Page Option to switch account:



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

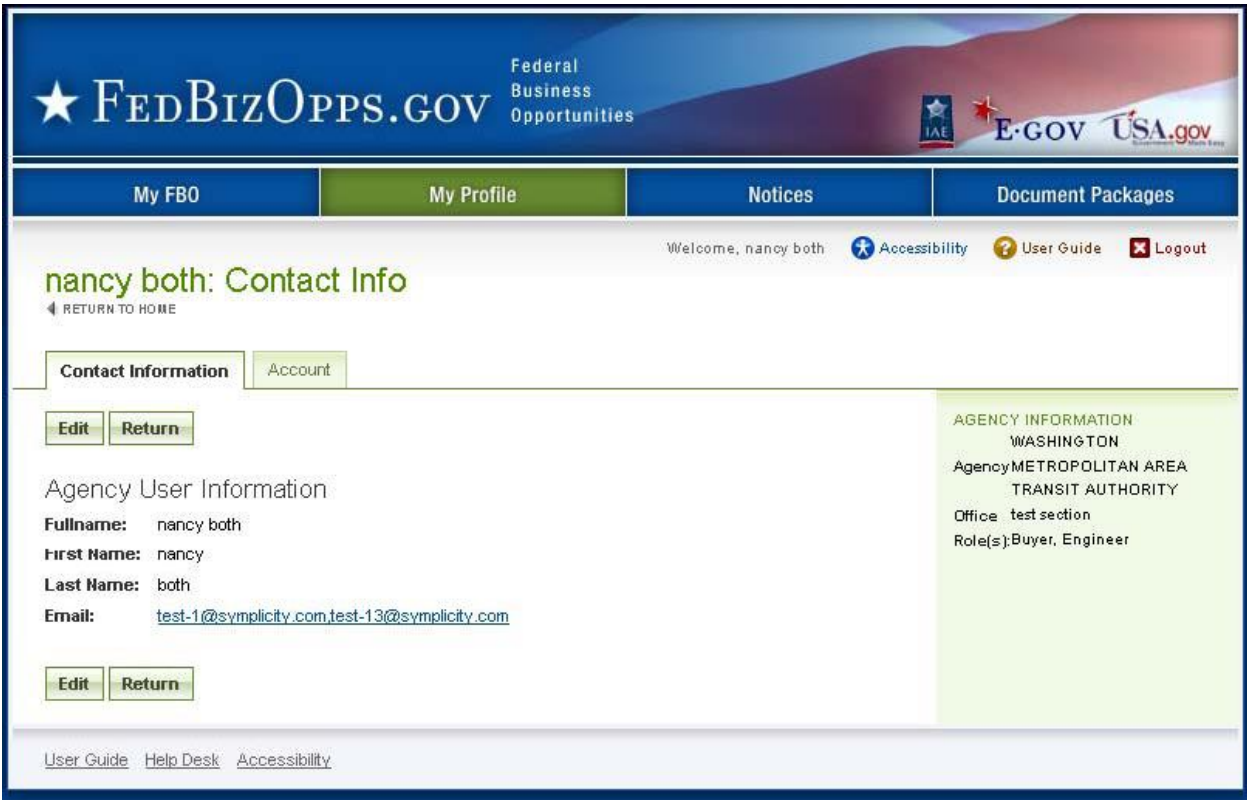


- I. When a user is about to change accounts, the system will present the following warning. If a user switches accounts without saving work, they will lose those edits.



### 3.2.3 My Profile

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

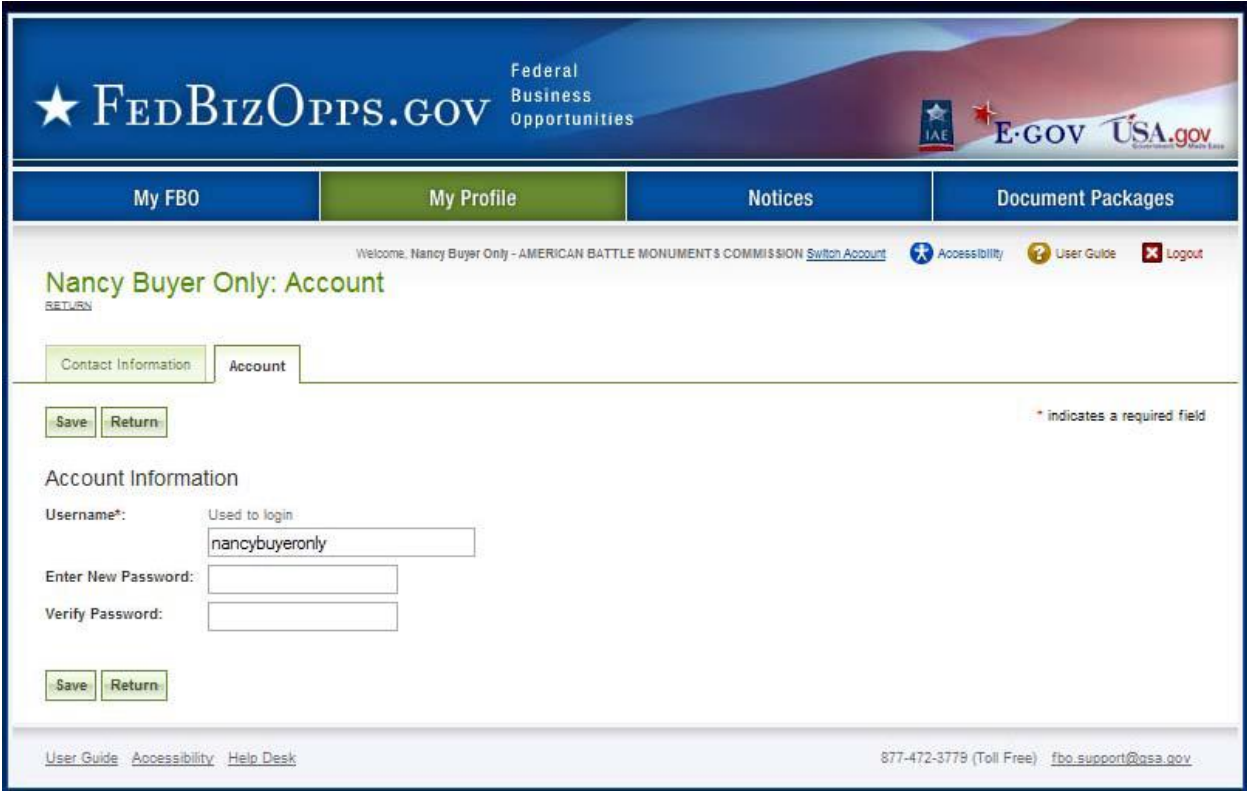


I. Enter field changes as desired. Select save to save updates to the form.

The screenshot shows the 'My Profile' page on FEDBIZOPPS.GOV. The user is logged in as 'nancy both'. The page has a navigation bar with 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below the navigation bar, there are links for 'Welcome, nancy both', 'Accessibility', 'User Guide', and 'Logout'. The main heading is 'nancy both: Contact Info' with a 'RETURN' link. There are two tabs: 'Contact Information' (selected) and 'Account'. Below the tabs are 'Save' and 'Return' buttons. A note states '\* indicates a required field'. The 'Agency User Information' section includes a sub-heading 'Edit your personal information' and a form with the following fields: Title, Fullname\* (nancy both), First Name (nancy), Middle Name, Last Name (both), Suffix, Email\* (test-1@symplicity.com, test-13@sym), Phone, Cell Phone, and Fax. On the right side, there is an 'AGENCY INFORMATION' section with the following details: WASHINGTON, Agency METROPOLITAN AREA TRANSIT AUTHORITY, Office test section, and Role(s) Buyer, Engineer. At the bottom of the form are 'Save' and 'Return' buttons.

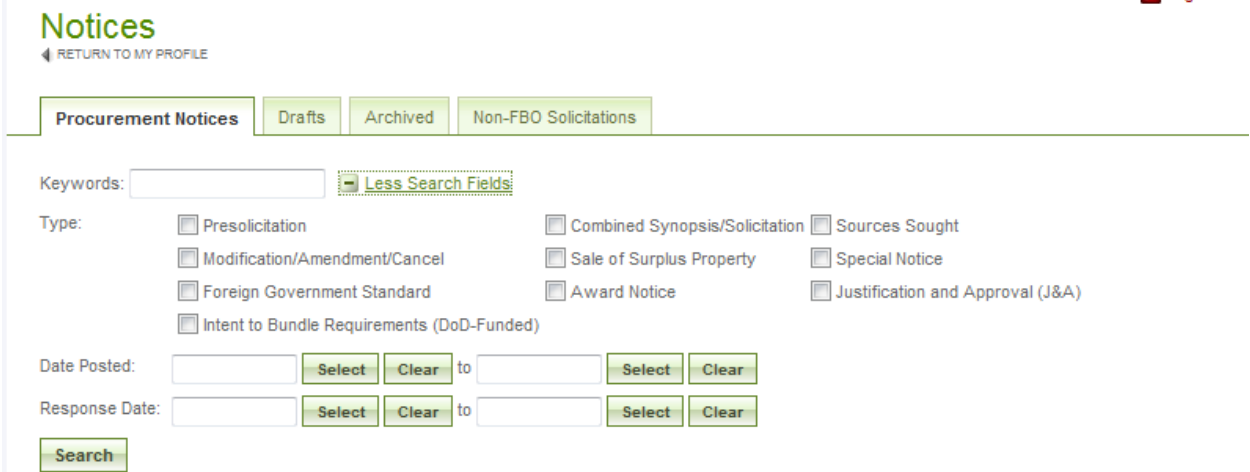


- I. From the account tab, users can change their username or password.
- II. Select save to save updates to the form.



### 3.2.4 Procurement Notices

- I. There are four sub-tabs on the Notices page. Procurement Notices lists all Posted (viewable on vendor interface) notices.
- II. The Draft sub-tab presents a list of draft (not viewable on vendor interface) notices.
- III. The Archived sub-tab presents a list of archived notices no longer viewable on the vendor interface.
- IV. The Non-FBO Solicitations sub-tab lists links to documents posted in FBO for viewing outside the context of FBO notices. Note: These sorts of links were previously managed through FedTeDS.
- V. More opens up additional search filters (less closes the added search filters).



### 3.2.5 Document Packages

- I. There are three sub-tabs on the user’s Document Packages page. The packages sub-tab presents the list of active document packages associated with their registered agency/office.
- II. The archived tab presents list of archived document packages associated with their registered agency/office.
- III. The authorized parties tab has three sub tabs which enumerate, authorized vendors, pending requests for authorization, and rejected requests for authorization.
- IV. The keyword search allows a user to conduct a full word search of the document title. More Search Fields opens up additional search filters (Less closes the added search filters).

The screenshot shows the 'Document Packages/Links' page with the 'Packages' tab selected. It features a search bar with 'Keywords:' and a 'Search' button. Below the search bar, it indicates 'Items 1-20 of 39' and 'Showing 20 per page'. A table lists two items:

Label / PR #	Type	Solicitation -	Created on	Posted On
<b>072710</b> 383 test	Solicitation	<a href="#">072710</a>	Jul 27, 2010 11:25 am	Jul 27, 2010
<b>Amendment 1</b> sample J&A word doc	Mod/Amendment	<a href="#">MM-FBO-059</a>	Mar 17, 2009 7:18 pm	Mar 17, 2009

This screenshot shows the same 'Document Packages/Links' page but with the 'Less Search Fields' button highlighted. The search filters are expanded to include:

- Keywords: [input field]
- Secure:  yes  no
- Type: [dropdown menu]
- Posted Date: [input field] **Select** **Clear** to [input field] **Select** **Clear**
- Posted:  yes  no

A **Search** button is located below the filters. The page footer shows 'Items 1-20 of 39' and 'Showing 20 per page'.

### 3.3 Manage FBO Notices

#### 3.3.1 Create Notice

- I. From any page on the system, a user can go to upper navigation Notices button. This takes the user to the notices list.
- II. From the list, use the Create New Notice/Opportunity button, located at the bottom of the page, to initiate a new notice. To create a notice, the buyer will walk through a stepwise process.

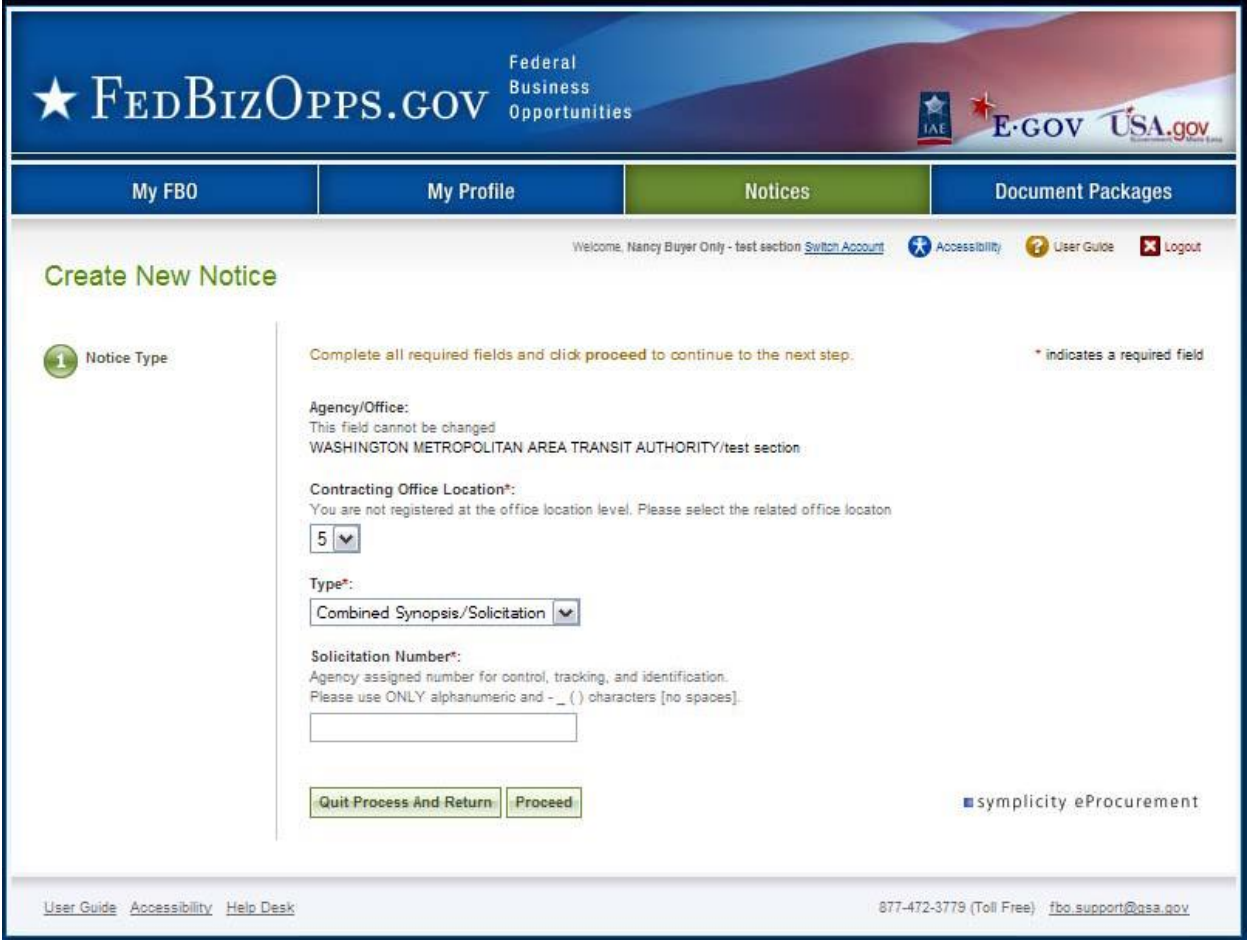


- III. Alternatively, a user can use the quicklink Create Notice on their home page to initiate a new notice.

**Step 1 – NOTICE TYPE**

The first step establishes the following fields for the Notice:

- I. Agency/Office – will be preset to a particular user’s agency if that user is only affiliated with one agency.
- II. Contracting Office Location– may be preset to a particular user’s agency if that user is only affiliated with one location.
- III. Type
- IV. Solicitation Number
- V. Note, data entered in step 1 cannot be edited later. Care should be taken to ensure accuracy of data entered.
- VI. Select proceed to move forward to step two.



**Step 2 – NOTICE Details**

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

Welcome, Micki BuyerEngineer - Office of Integrated Acquisition Environment (Symplcity Test Location) [Accessibility](#) [User Guide](#) [Logout](#)

### Create New Notice

[RETURN TO NOTICES](#) [RETURN TO LIST \(NOTICES\)](#)

- 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.

<b>Solicitation #:</b> Test-000001	<b>Procurement Type:</b> Presolicitation	<b>Date Posted:</b> Date on which the synopsis is posted to the Web. July 30, 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.

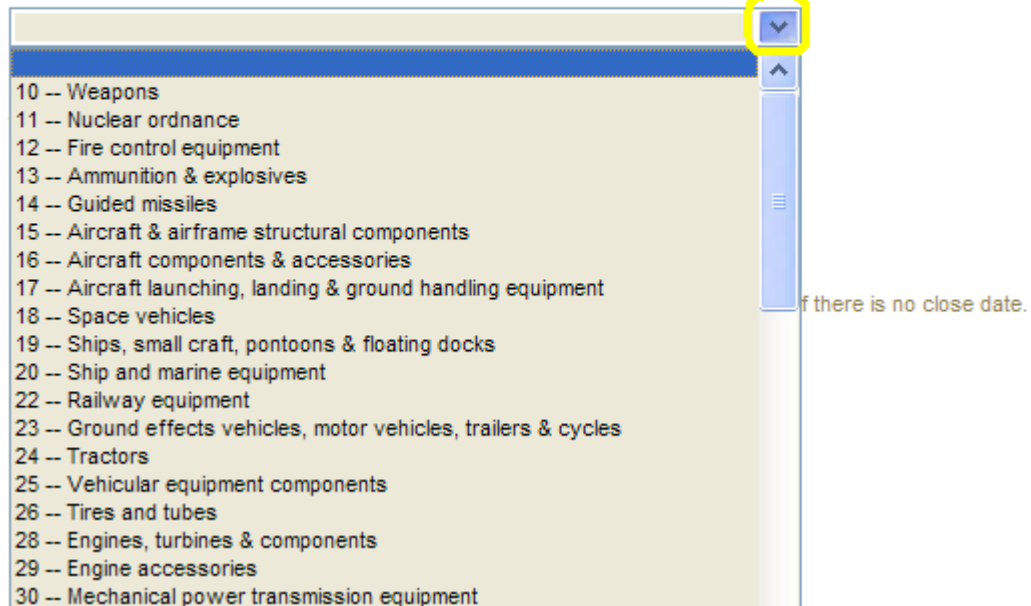
**NAICS Code\*:**  
Type the NAICS code to search for NAICS codes  
    
[Having Problems With This Field? Click Here.](#)

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

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

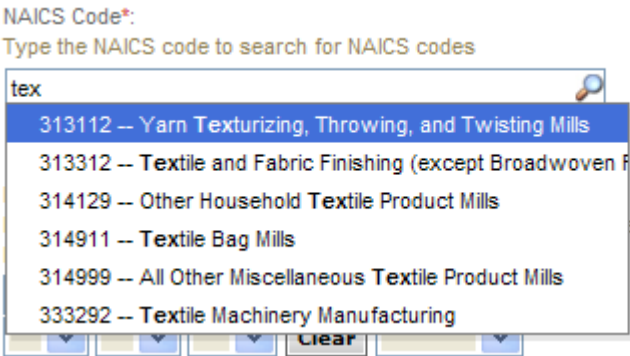
**Classification Code\*:**

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.

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



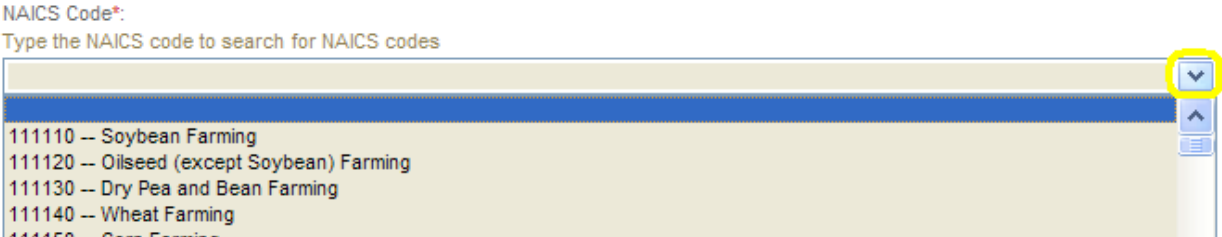
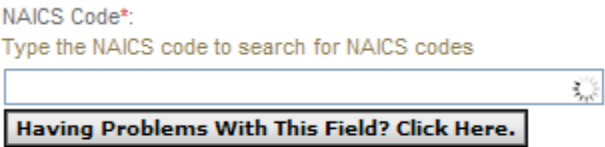
es. Leave empty if there

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



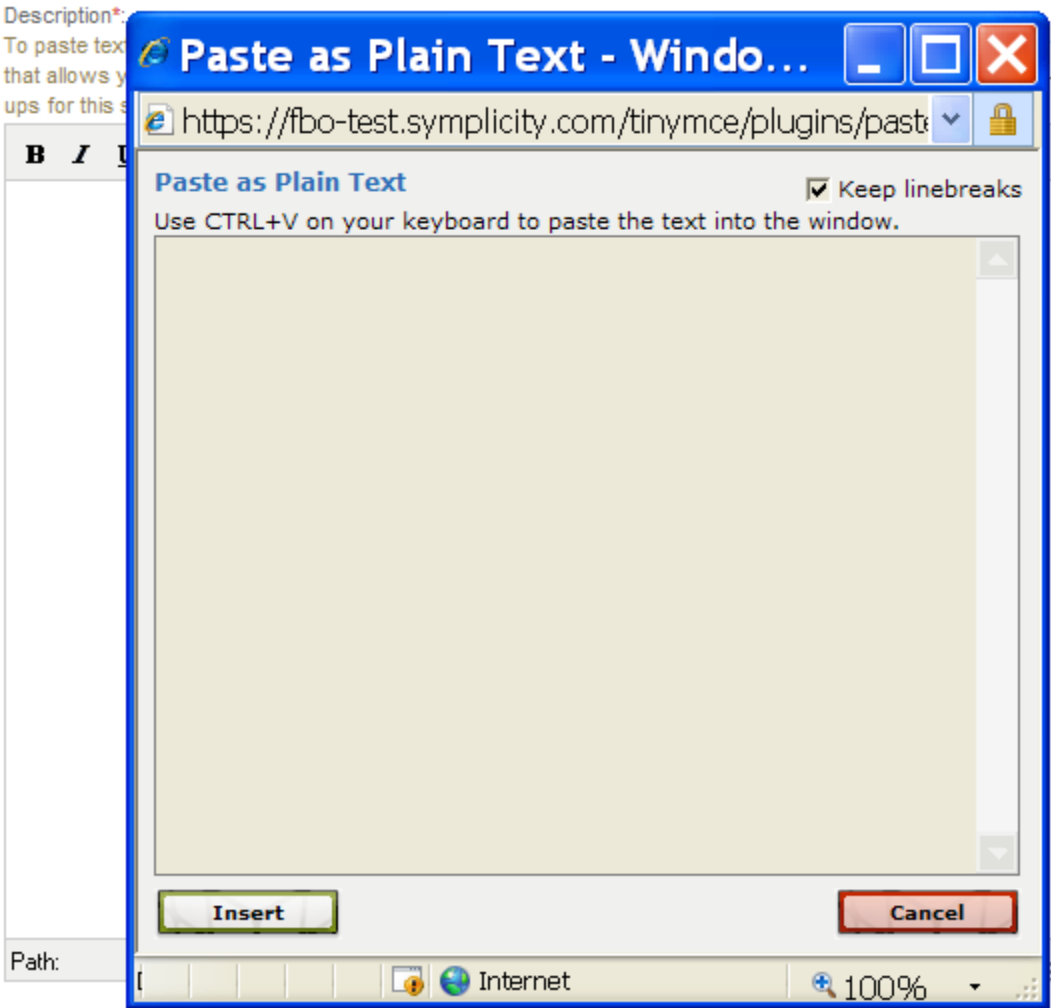
es. Le

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






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



For the IVL (Interested Vendor List) fields, agency administrators can force agency solicitations to be configured a certain way on the two fields that pertain to IVL. If the IVL fields are not editable, the system is applying agency forced values for this setting. Contact you Agency Administrator for FBO if you have questions on these settings. *Note: The Interested Vendor list is only available to those with FBO accounts. Agency buyers/engineers will need to go to the FBO homepage and login in order to view.*

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

Image of Notice list, displaying draft notice:

Title ▼	Sol/Ref Number ▼	Type ▼	Response Deadline ▼	Modified ▼
	SPM7L508R0033	Presolicitation	-	Apr 02, 2008 10:10 am

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

**Archiving Policy\*:**  
 Archiving policy. Synopsis and associated documents may be scheduled for archiving fifteen days after the response date, or upon a user-specified date subsequent to the posting date, or left unscheduled and manually archived later. The latest archiving date chosen for a synopsis or any associated document will become the effective archiving date for the entire document set.

Automatic, 15 days after response date  
 Automatic, on specified date  
 Manual Archive

**Allow Vendors To Add/Remove From Interested Vendors\*:**  
 Choose "yes" if you want vendors to be able to add/remove themselves.

yes  no

**Allow Vendors To View Interested Vendors List\*:**  
 Choose "yes" if you want vendors to be able to view the interested vendors list

yes  no

**Step 3 – Attachments**

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



Controlled, Unclassified Attachments


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

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

**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..)

**Enter PR# To Search Existing\*:**

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

**Find Package**

**Remove Package**

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

- I. If adding new, a form will present that allows the user to set up the package.
- II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

**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..)

**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

---

 **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

---

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





Non-Sensitive/Secure Attachments

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

**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.

Browse... Large Upload (Java) Large Upload (Flash)

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

Description\*:

Enter in a short description for this file/link

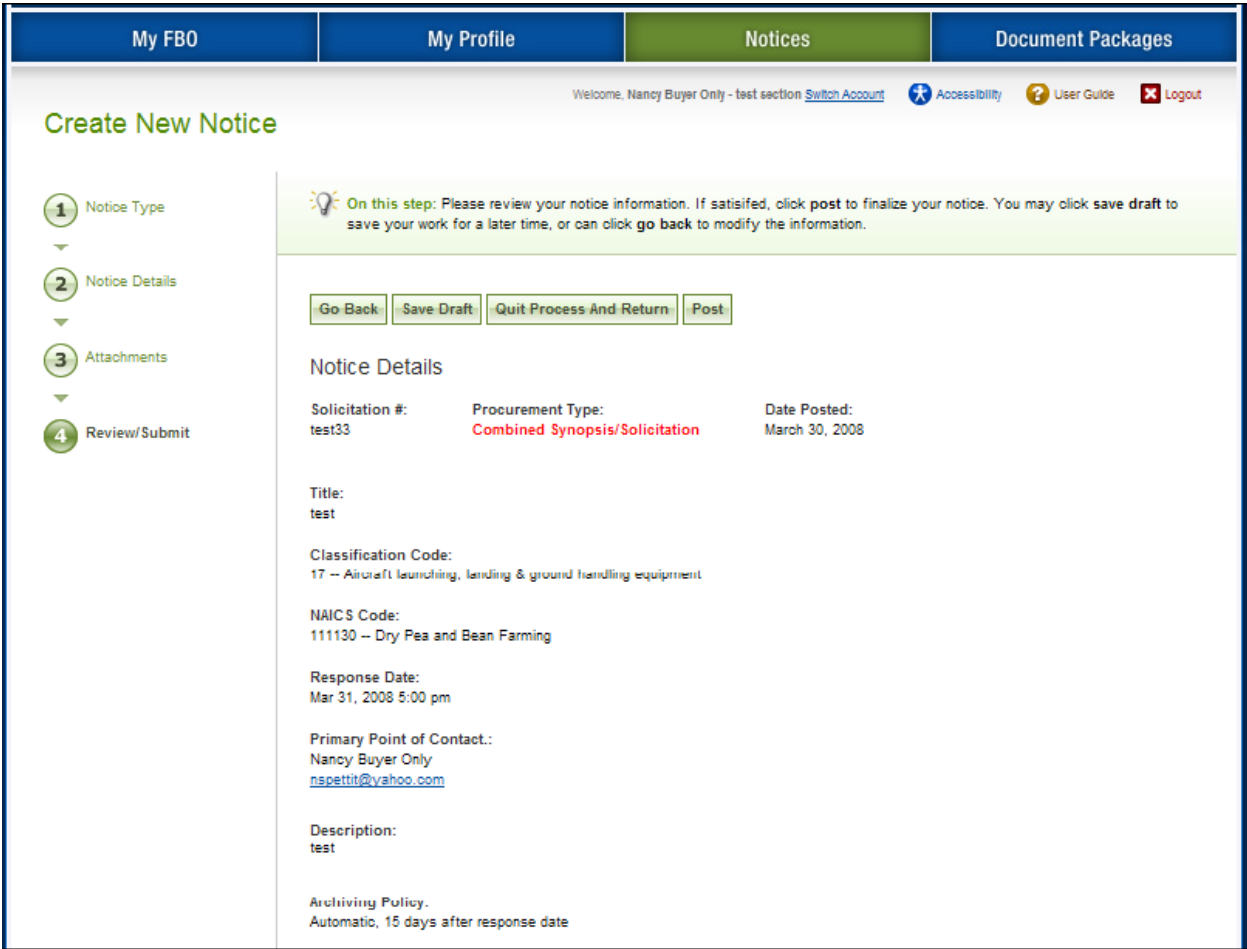
Remove This File / Link

---


Add Another File / Link To This Package

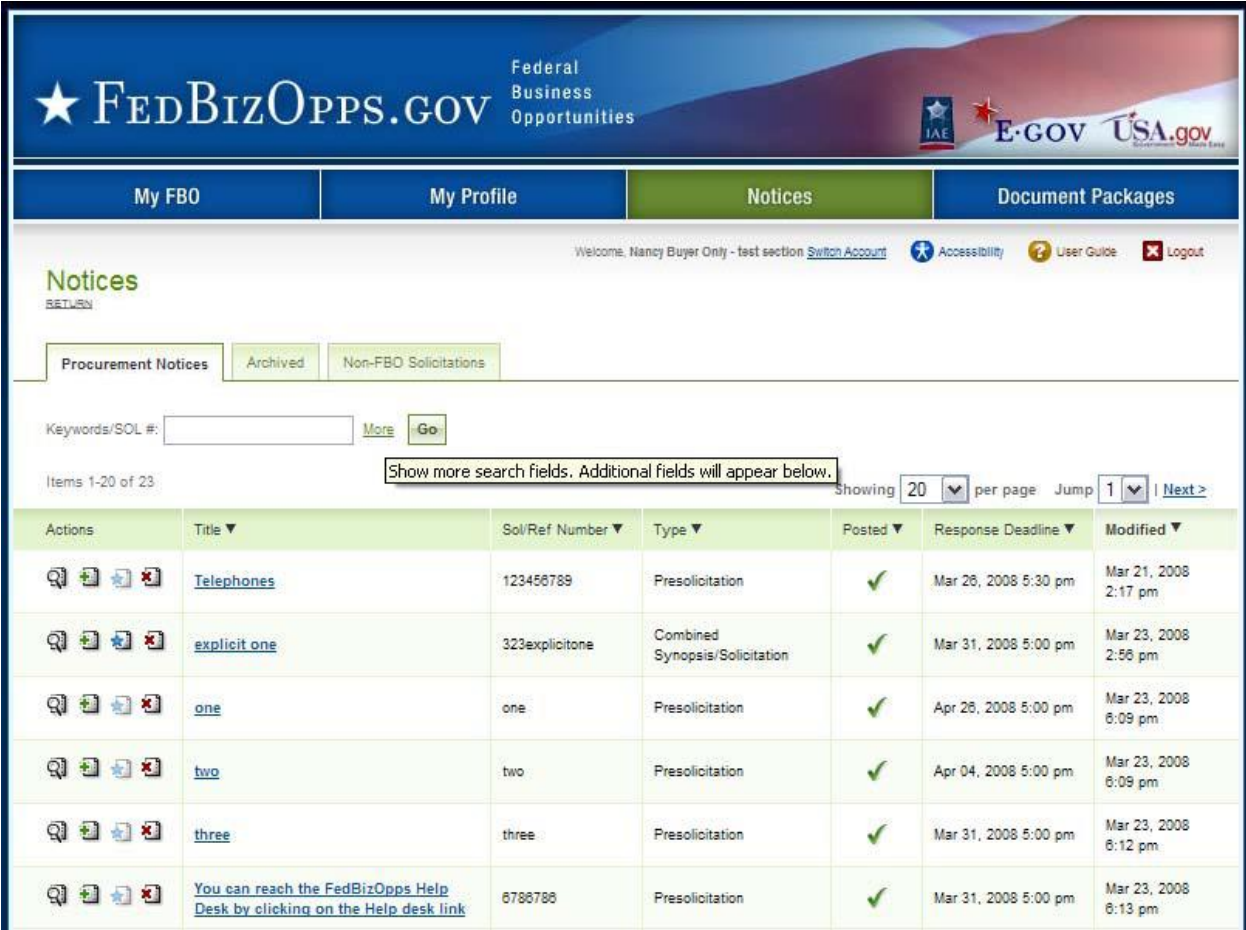
**Step 4 – Review / Submit (Note – If the Bid Module is enabled, 'Review / Submit' becomes Step 5 in the process. See section 3.4 for more details. )**

- I. The fourth step allows the user to review the notice and attachments and to submit the notice.
- II. The go back button takes user back in reverse order of the previous steps (3, 2, 1) and allows the user to edit data entered in earlier steps.
- III. Save Draft saves the materials to the draft notice.
- IV. Quit Process And Return returns the user to the previous navigation
- V. Delete allows the user to delete the draft package (save draft must have been used previously to see this option).
- VI. Print allows user to open the notice in a printer friendly format. See page 68 for more details.
- VII. Post moves the notice for review by users.



### 3.3.2 Modify/Amend Notice

























- I. From any page on the system, a user can go to upper navigation Notices button and then use the modify/amend option to make edits to the notice. Look for: 
- II. Additionally, a user can use the quicklink Mod/Amend Notice on their My FBO page to modify / amend a notice.



Notices

Keywords/SOL #:  [More](#)

Items 1-20 of 23 Show more search fields. Additional fields will appear below. Showing 20 per page Jump 1 | [Next >](#)

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
   	<a href="#">Telephones</a>	123456789	Presolicitation	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm
   	<a href="#">explicit one</a>	323explicitone	Combined Synopsis/Solicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 2:56 pm
   	<a href="#">one</a>	one	Presolicitation	✓	Apr 26, 2008 5:00 pm	Mar 23, 2008 6:09 pm
   	<a href="#">two</a>	two	Presolicitation	✓	Apr 04, 2008 5:00 pm	Mar 23, 2008 6:09 pm
   	<a href="#">three</a>	three	Presolicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:12 pm
   	<a href="#">You can reach the FedBizOpps Help Desk by clicking on the Help desk link</a>	6786786	Presolicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:13 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. Note, if the Bid Module is enabled, there will be an additional option presented called Bids (CLIN/Doc Packages). See section 3.3.10 for more details.
- II. The system will then present the appropriate steps to allow the user to make the requested modifications/amendments.
- III. If making edits to notice details, they will be taken to notice details step.
- IV. If only attaching files, the user is taken directly to attachments.



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



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

II.

**Notice Details**

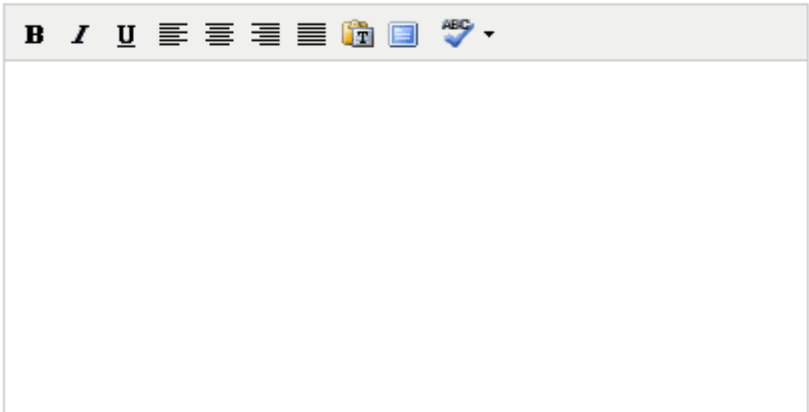
*\* indicates a required field*

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

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

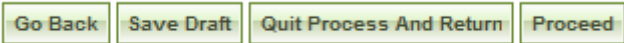
**Add The Following To Description\*:**

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.

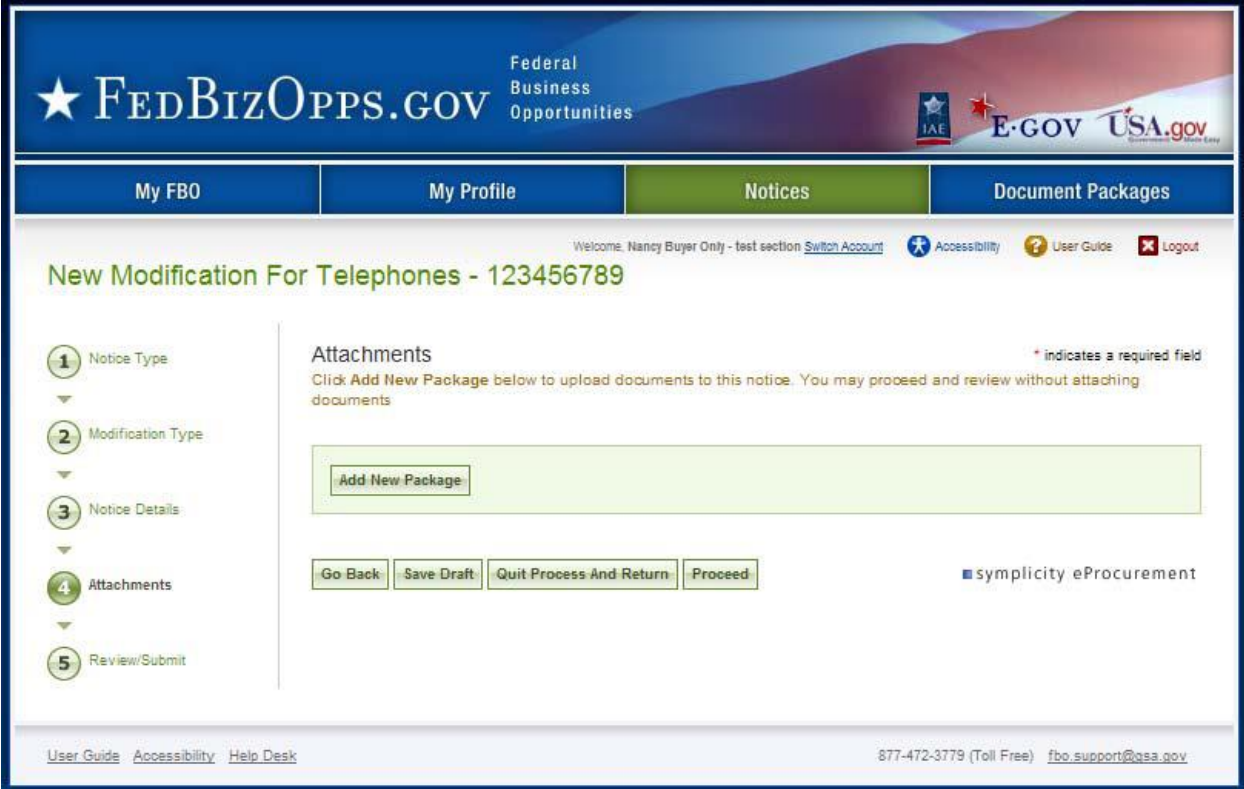


- 1 Notice Type
- 2 Modificaton Type
- 3 Notice Details
- 4 Attachments
- 5 Review/Submit

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



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



**Controlled, Unclassified Attachments**

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

- I. When a buyer is adding a new package, the first step is to indicate whether the attachment is a sensitive/secure package.
- II. If yes, this means the buyer wishes to attach a document that has been uploaded by an engineer (unless they are themselves an engineer). If the buyer indicates yes, then the buyer is prompted to select the PR# from a list of available packages.
- III. The buyer is also given the option to manually enter the PR# and use the find package button.
- IV. The buyer must also determine the package type (the options will align with the notice type).

**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

Add New Package

Go BackSave DraftQuit Process And ReturnProceed

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



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

**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 is package sensitive/secure?<sup>\*</sup>

yes  no

Do you want to create new or attach/select existing?<sup>\*</sup>

Create New  Attach/Select Existing


PR #<sup>\*</sup>:

Label<sup>\*</sup>:

Project #:

NSN / MMAC:

- I. If adding new, a form will present that allows the user to set up the package. Users can either create a new package or select an existing package.
- II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

 **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..)

**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

---

 **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

---

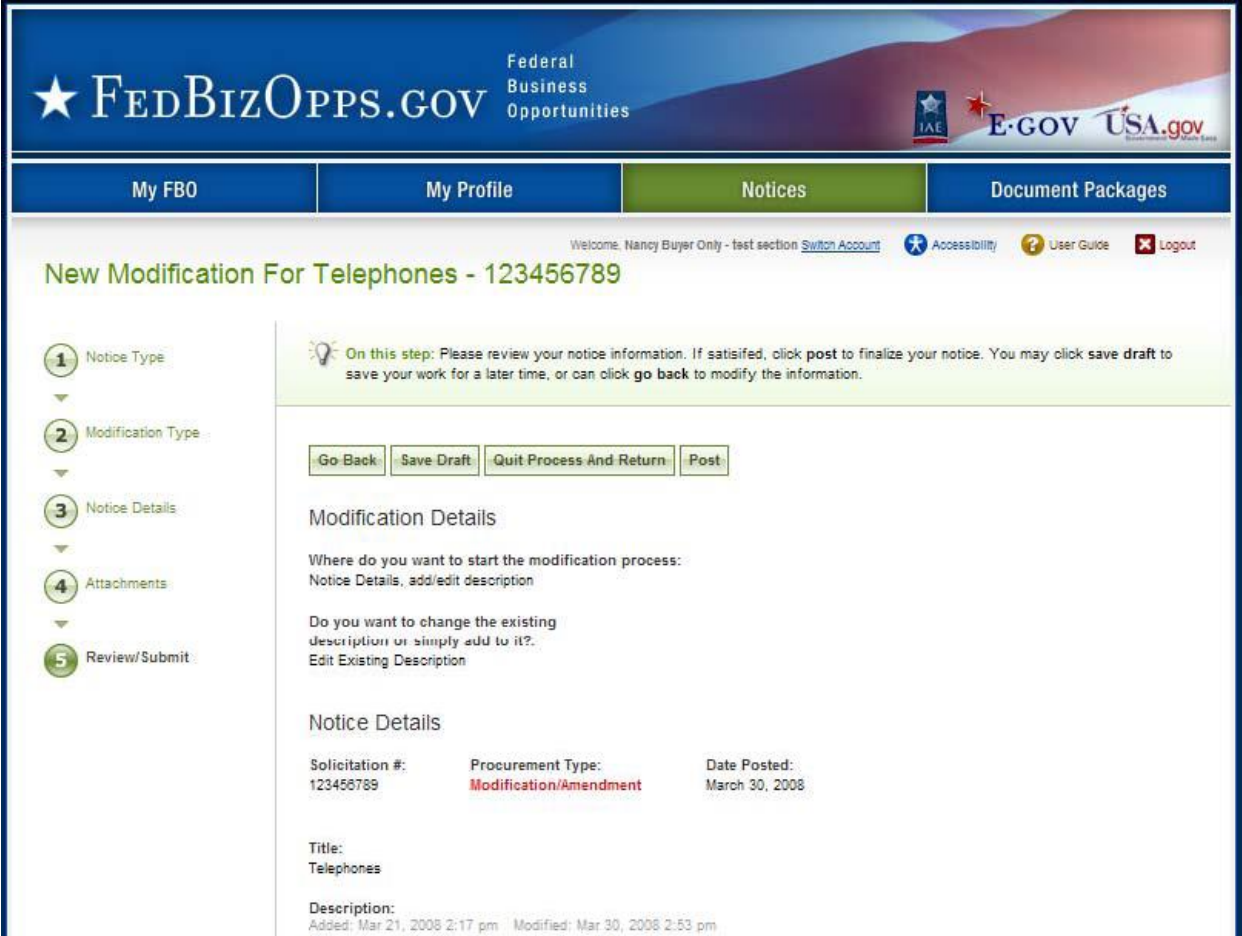
- I. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.
- II. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.
- III. Once the secure package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

---


Non-Sensitive/Secure Attachments

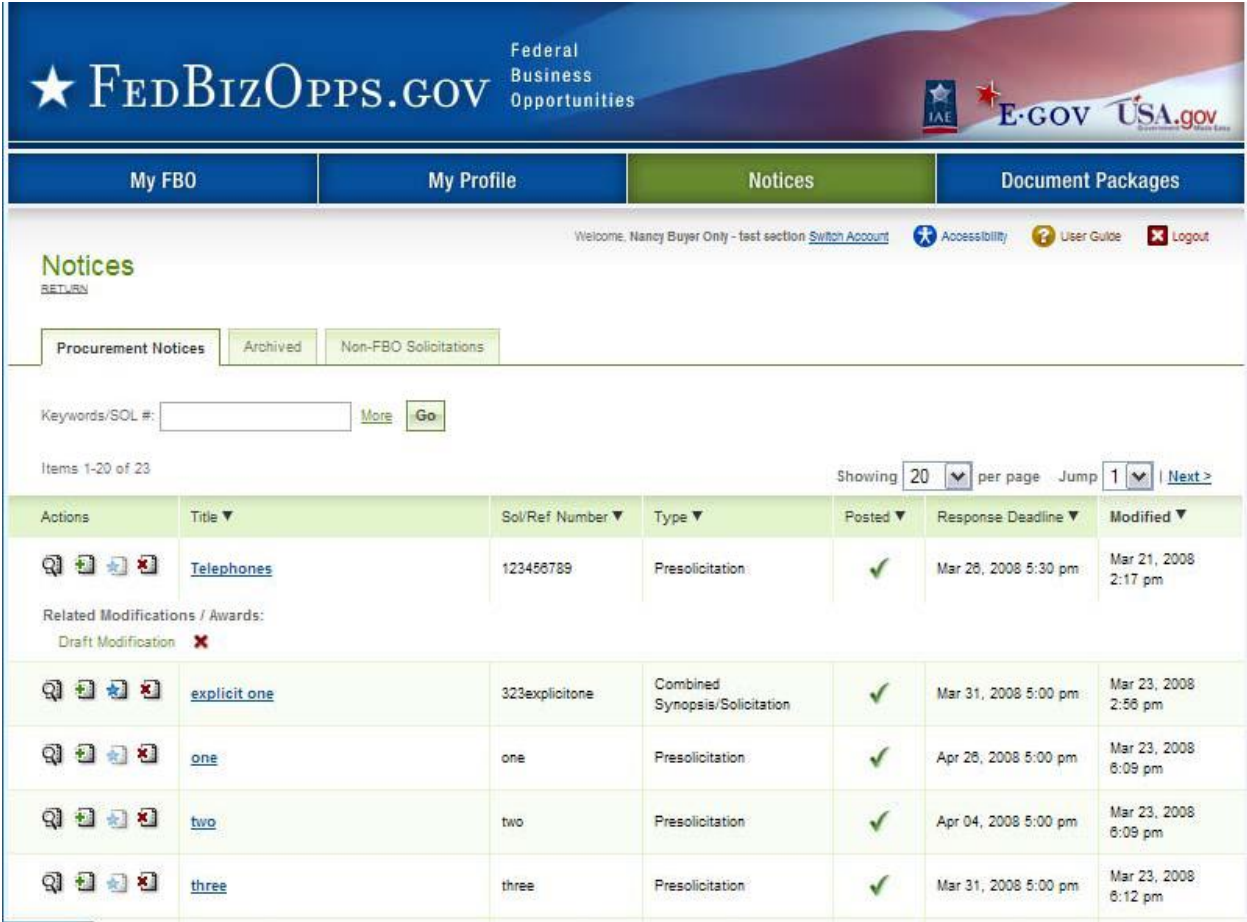
- I. If the user is attaching a document that is not sensitive/secure, they should mark Is this package sensitive/secure? no.
- II. Next, users are prompted to enter the package type (available package type options will align with the notice type).
- III. On the file Type field, the user indicates whether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

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



### 3.3.3 Create Award

- I. From any page on the system, a user can go to upper navigation Notices button and then use the create award button to add an award to the notice. Look for: 
- II. Additionally, a user can use the quicklink create award on their My FBO page to modify / amend a notice.
- III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.



The screenshot shows the 'Notices' section of the FEDBIZOPPS.GOV website. The page has a blue header with the site logo and navigation tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below the header, there are tabs for 'Procurement Notices', 'Archived', and 'Non-FBO Solicitations'. A search bar for 'Keywords/SOL #' is present, along with 'More' and 'Go' buttons. The main content area displays a table of notices with the following data:

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
	<a href="#">Telephones</a>	123456789	Presolicitation	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm
Related Modifications / Awards: Draft Modification ✗						
	<a href="#">explicit one</a>	323explicitone	Combined Synopsis/Solicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 2:56 pm
	<a href="#">one</a>	one	Presolicitation	✓	Apr 26, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	<a href="#">two</a>	two	Presolicitation	✓	Apr 04, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	<a href="#">three</a>	three	Presolicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:12 pm

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

**FEDBIZOPPS.GOV** Federal Business Opportunities

My FBO | My Profile | **Notices** | Document Packages

Welcome, Nancy Buyer Only - test section [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

### New Award For Another test - 456987123

**1** Notice Type

**2** Notice Details

**3** Attachments

**4** Review/Submit

**Notice Details** \* indicates a required field

Please enter in contract award details 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 Award for later. Otherwise, click **proceed** to review your information

Solicitation #: 456987123      Procurement Type: **Award Notice**      Date Posted: March 30, 2008

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

**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.  
30 -- Mechanical power transmission equipment

**NAICS Code:**  
Type the naics code to search for naics codes  
111180 -- Rice Farming

**Contract Award Date\*:**  
The date the contract was awarded

Contract Award Number\*

- III. The form is too long to capture in a screen shot. Users should work through the form in sequence.
- IV. At the bottom of the form, the save draft button saves the award in draft format.
- V. Quit Process and Return returns the user to the list of notices
- VI. Go back allows the user to go back in the stepwise process.
- VII. Proceed moves the user forward in the stepwise process.

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






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



### 3.3.4 Cancel Notice


- I. From any page on the system, a user can go to upper navigation Notices button and then use the cancel award button to cancel the notice. Look for: 
- II. Additionally, a user can use the quicklink cancel notice on their My FBO page to cancel a notice.



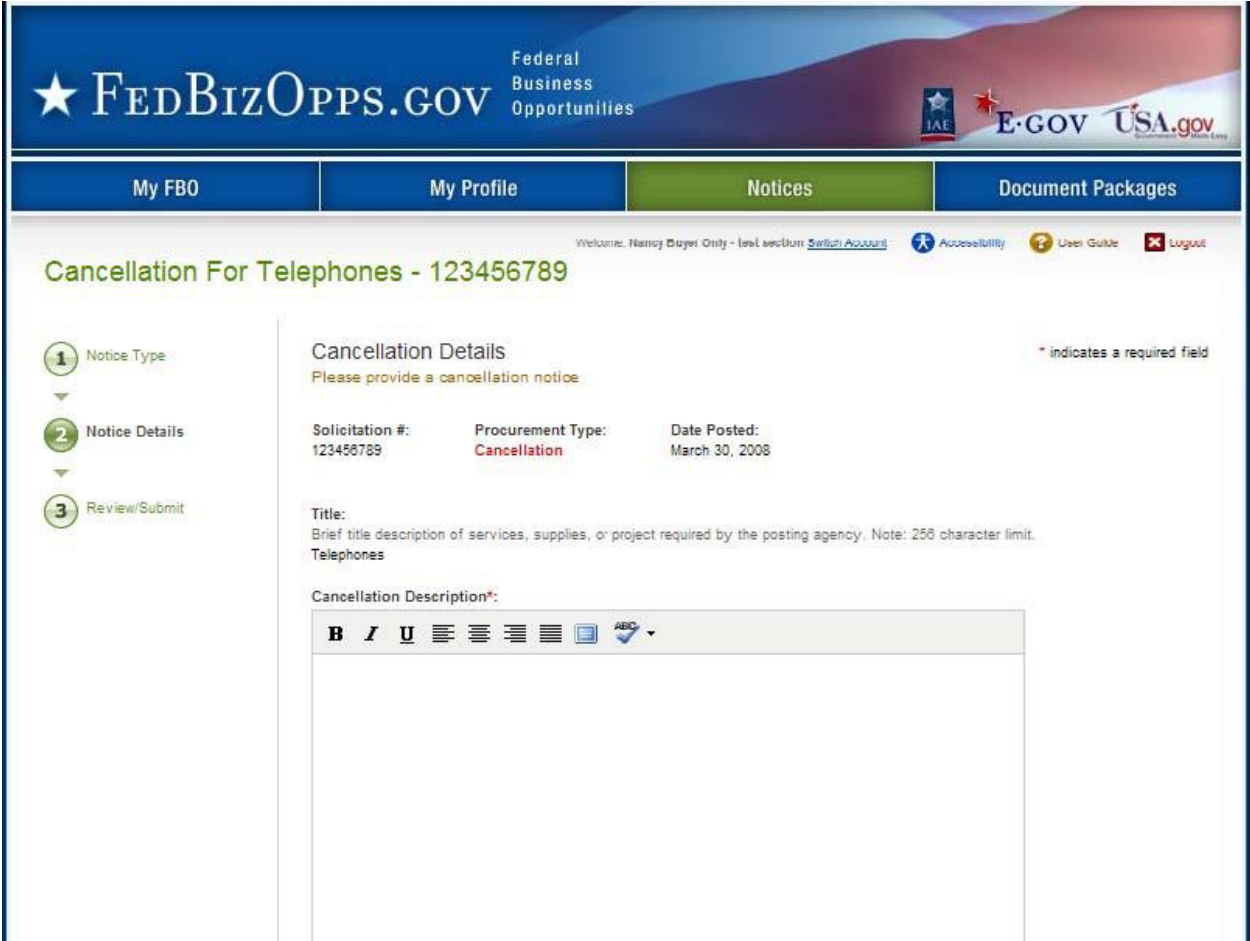
Notices

Keywords/SOL #:  [More](#)

Items 1-20 of 23 Showing 20 per page Jump 1 | [Next >](#)

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
	<a href="#">Telephones</a>	123456789	Presolicitation	✓	Mar 26, 2008 5:30 pm	Mar 21, 2008 2:17 pm
Related Modifications / Awards:						
Draft Modification 						
	<a href="#">explicit one</a>	323explicitone	Combined Synopsis/Solicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 2:56 pm
	<a href="#">one</a>	one	Presolicitation	✓	Apr 26, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	<a href="#">two</a>	two	Presolicitation	✓	Apr 04, 2008 5:00 pm	Mar 23, 2008 6:09 pm
	<a href="#">three</a>	three	Presolicitation	✓	Mar 31, 2008 5:00 pm	Mar 23, 2008 6:12 pm

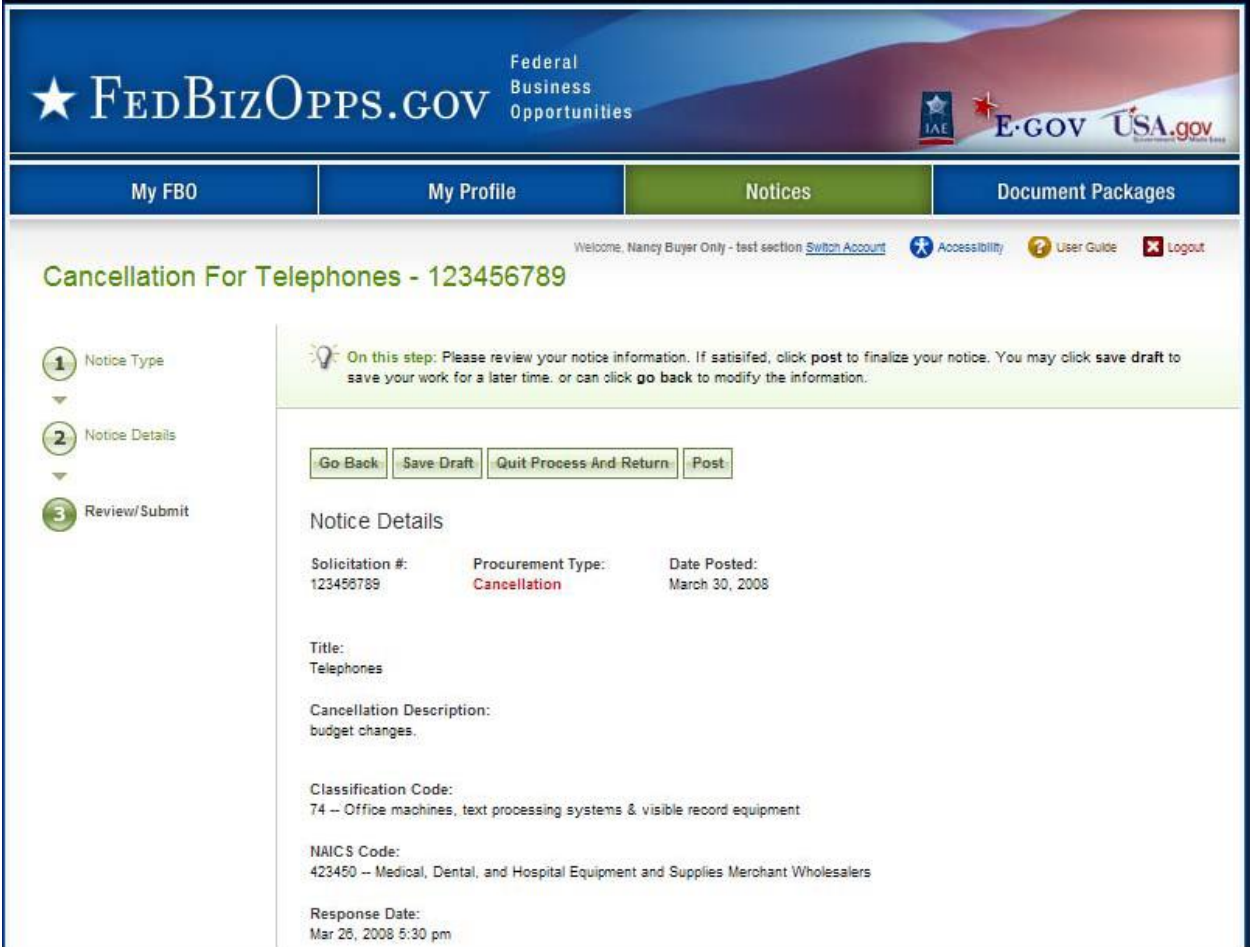
- I. If an award is being cancelled, the user is prompted to enter additional text that will be highlighted to vendors reviewing the cancelled notice.



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



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



### 3.3.5 Deletion of Draft Notices

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

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below this, a user is logged in as 'Admin User'. The main content area is titled 'Notices' and includes a 'RETURN' link. There are tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. A search bar for 'Keywords/GOL #' is present with 'More', 'Go', and 'Clear' buttons. Below the search bar, it indicates 'Items 1-20 of 76' and 'Showing 20 per page'. A table displays the first three items, each with a red 'x' icon in the 'Title' column, indicating they are drafts.

Title ▼	Sol/Ref Number ▼	Type ▼	Response Deadline ▼	Modified ▼
	SPM7L508R0033	Presolicitation	-	Apr 02, 2008 10:10 am
	WARS836210	Presolicitation	-	Apr 02, 2008 11:05 am
	SPM4A7-08-R-1073	Presolicitation	-	Apr 02, 2008 12:47 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.

Welcome, nance buyer - African Development Foundation (African Development Foundation, Washington, DC) [Switch Account](#) [Accessibility](#) [Help](#) [Logout](#)

## Base Notice: new example solicitation - combined123

**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](#) [Post](#)

### Notice Details

Solicitation #: combined123	Procurement Type: <b>Combined Synopsis/Solicitation</b>	Date Posted: March 19, 2008
--------------------------------	--	--------------------------------

Title:  
new example solicitation

Classification Code:

### 3.3.6 Archive Notices

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

The screenshot shows the FEDBIZOPPS.GOV website interface. The top navigation bar includes 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. The 'Notices' section is active, displaying a list of notices. Below the list, there are tabs for 'Notice Information', 'Packages', and 'Interested Vendors'. The 'Notice Information' tab is selected, showing details for a notice titled '1test replication - aabb'. The notice information includes solicitation number, agency/office, location, and creation/modification dates. A 'PROCUREMENT NOTICE INFO' box on the right provides additional details like 'Created: April 9, 2008 10:39 am' and 'Modified: April 18, 2008 1:19 pm'. A 'NOTICE HISTORY' box shows the original notice date as 'Apr 18, 2008'.

**Notices List:**

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
	<a href="#">1test replication</a>	aabb	Presolicitation	✓	-	Apr 18, 2008 1:19 pm
	<a href="#">417buyer sol</a>	78979a8sd7f	Combined Synopsis/Solicitation	✓	-	Apr 17, 2008 11:33 am

**Notice Information:**

**Base Notice: 1test replication - aabb**

**Notice Information**

Solicitation: aabb      Agency/Office: test section

Location: 5

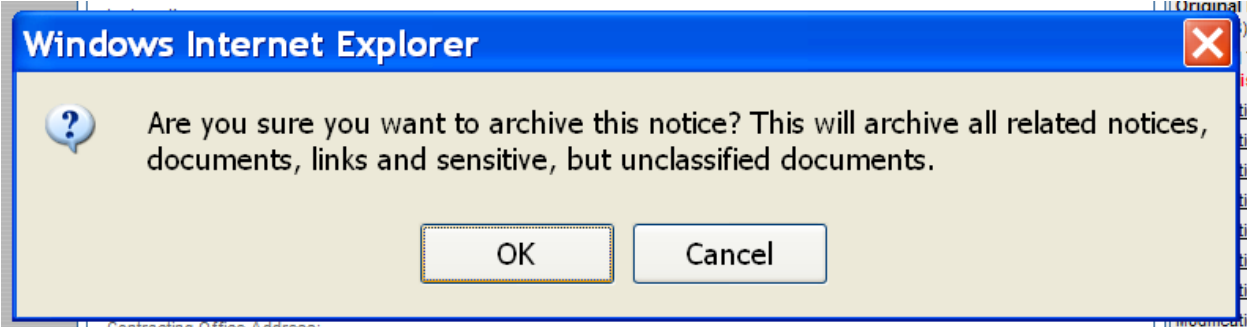
**PROCUREMENT NOTICE INFO**

Created: April 9, 2008 10:39 am  
 By: [nancy both](#)  
 Modified: April 18, 2008 1:19 pm  
 By: [nancy both](#)

**NOTICE HISTORY**

Original Notice: aabb (Apr 18, 2008)

I. User will be asked to confirm the archive.





### 3.3.7 Unarchive Notices

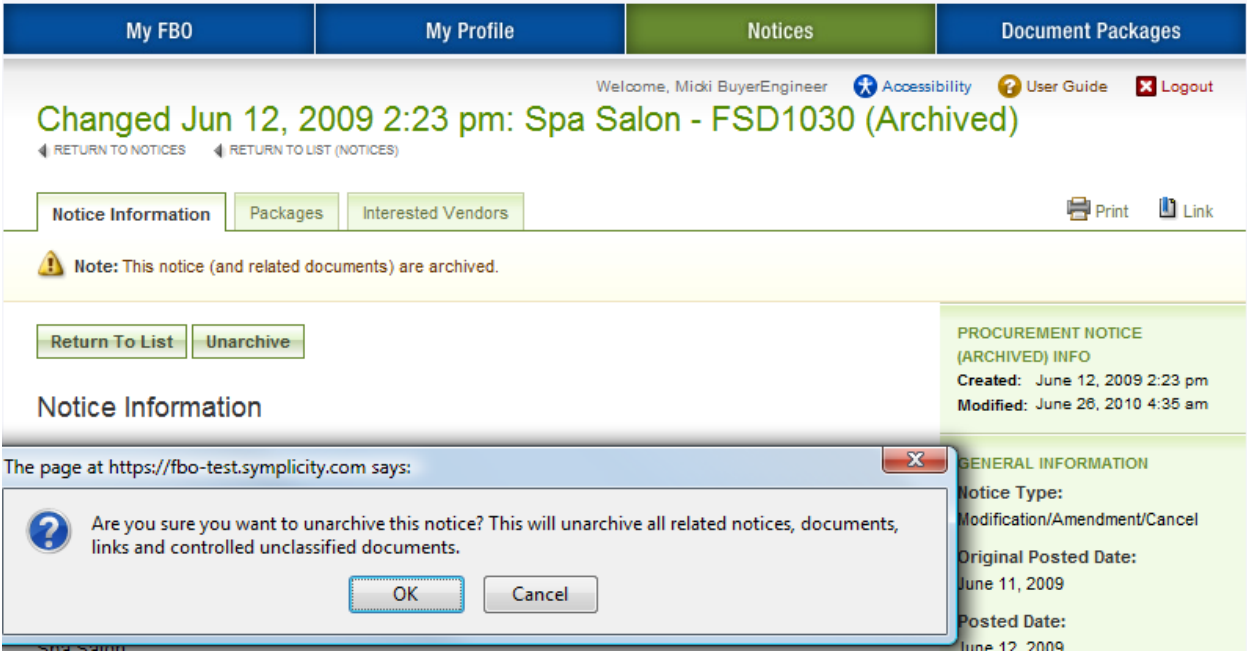
- I. To review all archived notices, go to upper navigation notices and the sub-tab archived.
- II. To unarchive the notice, from the archived sub tab, click on the view icon for the notice.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. The 'Notices' tab is active. Below the navigation bar, there is a header area with the text 'Federal Business Opportunities' and logos for 'IAE', 'E-GOV', and 'USA.gov'. A user greeting 'Welcome, Admin User' is visible, along with links for 'Accessibility', 'User Guide', and 'Logout'. The main content area is titled 'Notices' and includes a 'RETURN' link. There are four sub-tabs: 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. The 'Archived' sub-tab is selected. Below the sub-tabs, there is a search box for 'Keywords/SOL #' with 'More', 'Go', and 'Clear' buttons. The results show '1 - 20 of 459' items. A pagination bar indicates '1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | [23]'. A table displays the following data:

	Title ▼	Sol/Ref # ▼	Type ▼	Last Posted Date	Archived On ▲
	99 -- International Broadcast Rights for TV Programming from MarVista Entertainment	316480606456	Special Notice	Mar 10, 2008	Mar 29, 2008 12:00 am
	70 -- Complete Apple Computer System	HQ002873479002	Special Notice (Modified)	Mar 04, 2008	Mar 21, 2008 12:00 am

Modification 4 - Mar 04, 2008

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



### 3.3.8 Print Notices

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

The screenshot shows the 'Notices' section of the FEDBIZOPPS.GOV website. The header includes the site logo and navigation tabs: 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below the header, there are utility links for 'Accessibility', 'User Guide', and 'Logout'. The main content area is titled 'Notices' and includes a 'RETURN TO HOME' link. There are tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. A search box for 'Keywords/SOL #' is present with 'More' and 'Go' buttons. Below the search, it indicates 'Items 1-20 of 30' and 'Showing 20 per page'. A table lists two notices:

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
	<a href="#">1test replication</a>	aabb	Presolicitation	✓	-	Apr 18, 2008 1:19 pm
	<a href="#">417buyer sol</a>	78979a8sd7f	Combined Synopsis/Solicitation	✓	-	Apr 17, 2008 11:33 am

Below the table, there is a section for 'Related Modifications / Awards' showing 'Modification 1 Apr 17, 2008'.

The screenshot shows the 'Base Notice' page for 'teset - 777423sol'. The header is similar to the previous screenshot. The main content area is titled 'Base Notice: teset - 777423sol' and includes 'RETURN' and 'RETURN TO LIST (PROCUREMENT)' links. There are tabs for 'Notice Information', 'Packages', and 'Interested Vendors'. A 'Print' button is visible. A yellow warning box states: 'Note: This notice has been posted. Any changes must be done in the form a new modification/amendment notice'. Below this, there are buttons for 'Return To List', 'Modify/Amend', 'Archive', and 'Print'. The 'Notice Information' section displays:

Solicitation: 777423sol  
 Agency/Office: DELAWARE RIVER BASIN COMMISSION

On the right side, there is a 'PROCUREMENT NOTICE INFO' box with the following details:

Created: April 24, 2008 9:05 am  
 By: [nancy both](#)  
 Modified: April 24, 2008 9:05 am  
 By: [nancy both](#)

Below this is a 'NOTICE HISTORY' section.

- 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**

---

<b>Notice Type:</b> Award Notice	<b>Original Posted Date:</b> March 23, 2008
<b>Posted Date:</b> March 23, 2008	<b>Original Response Date:</b> Mar 31, 2008 5:00 pm
<b>Response Date:</b> -	
<b>Archiving Policy:</b> Automatic, 15 days after response date	
<b>Original Archive Date:</b> -	
<b>Archive Date:</b> -	
<b>Classification Code:</b> A -- Research & Development	
<b>NAICS Code:</b> 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

### 3.3.9 Review Interested Vendors List

- I. To review the interested vendors list for a solicitation, use the review icon to open the solicitation from the procurement notices list. *Note: The Interested Vendor list is only available to those with FBO accounts. Agency buyers / engineers will need to go to the FBO homepage and login in order to view.*

The screenshot shows the 'Notices' section of the FEDBIZOPPS.GOV website. The navigation bar includes 'My FBO', 'My Profile', 'Notices' (highlighted), and 'Document Packages'. The page title is 'Notices' with a 'RETURN TO HOME' link. There are tabs for 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. A search box for 'Keywords/SOL #' is present with 'More' and 'Go' buttons. Below the search, it says 'Items 1-20 of 30' and 'Showing 20 per page Jump 1 | Next >'. A table lists two notices:

Actions	Title	Sol/Ref Number	Type	Posted	Response Deadline	Modified
	<a href="#">test replication</a>	aabb	Presolicitation	✓	-	Apr 18, 2008 1:19 pm
	<a href="#">417buyersol</a>	78979a8sd7f	Combined Synopsis/Solicitation	✓	-	Apr 17, 2008 11:33 am

Below the table, it says 'Related Modifications / Awards: Modification 1 Apr 17, 2008'.

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

The screenshot shows the 'Interested Vendors' sub-tab for the solicitation '417buyersol - 78979a8sd7f'. The navigation bar includes 'My FBO', 'My Profile', 'Notices' (highlighted), and 'Document Packages'. The page title is '417buyersol - 78979a8sd7f' with 'RETURN' and 'RETURN TO LIST (PROCUREMENT)' links. There are tabs for 'Notice Information', 'Packages', and 'Interested Vendors' (highlighted). A search box for 'Keywords:' is present with a 'Go' button. Below the search, it says 'Items 1-1 of 1'. A table lists one vendor:

Last Name	First Name	Email	Contractor	Phone	Address
Vendor	Alan	<a href="mailto:test10@symplicity.com">test10@symplicity.com</a> , <a href="mailto:nspettit@yahoo.com">nspettit@yahoo.com</a> , <a href="mailto:btmnsop@gmail.com">btmnsop@gmail.com</a>	LOEB, H CORP	201-874-7854	419 SAWYER ST NEW BEDFORD MA 027461013

At the bottom, it says 'Items 1-1 of 1'.

## 3.4 Manage FBO Notices with Bid Module Enabled

### 3.4.1 Create Notice

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

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

#### 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:

**Edit CLIN information**

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

Line Item #1

Quantity\*:  
Enter the quantity of line item

1000

Children:  
Add a child line item

**Edit CLIN information**

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

Child Line Item #1

Quantity\*:  
Enter the quantity of line item

500

Children:  
Add a child line item

Add New Child Item Delete Child Line Item

Add New Child Item Delete

- 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 3.3.1 Create New Notice for more information on the next step.

### 3.4.2 Modify / Amend Notice

- I. From any page on the system, a user can go to upper navigation Notices button and then use the modify/amend option to make edits to the notice. Look for:
- II. Additionally, a user can use the quicklink Mod/Amend Notice on their My FBO page to modify / amend a notice. (See section 3.3.2, page 43 for a screen shot.)
- III. During the modification type step in the modify/amend process, the user indicates at which step they want to start the modification process:
  - a. add to or edit the description (see section 3.3.2)
  - b. attach files to the notice (see section 3.3.2)
  - c. bids (CLIN/Doc Packages)

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

**1** Notice Type

**2** Modification Type

**3** Notice Details

**4** Attachments

**Modification Details**

Where do you want to start the modification process\*:

- Notice Details, add/edit description
- Attachments, attach Files
- Bids (CLIN / Doc Packages)

Go Back Quit Process And Return Proceed

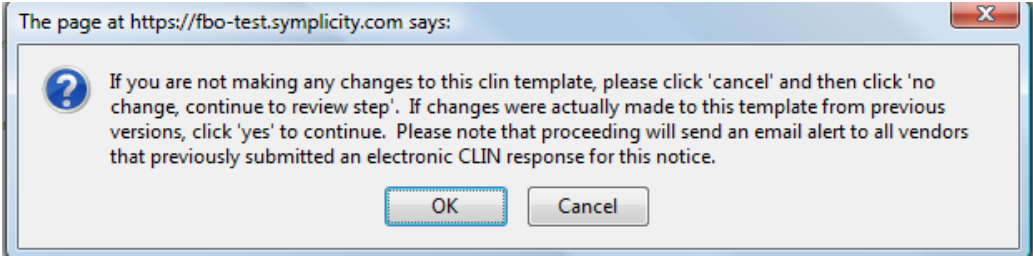


- IV. If the user indicates that they would like to start the modification process at the Bids section, the system will first allow the user to review/modify the type(s) of electronic submission previously selected (CLIN and/or Doc Package).
- V. Note, if the user previously created a CLIN template,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

The screenshot shows a web interface for a bid modification process. On the left is a vertical navigation menu with five numbered steps: 1. Notice Type, 2. Modification Type, 3. Notice Details, 4. Attachments, and 5. Bids. Under step 5, there are three sub-options: Type (selected), CLIN Template, and Review. The main content area is titled 'Bids' and includes a legend for 'Electronic Submission/ Responses' with two checked options: CLIN and Doc Package. At the bottom of the main content area is a row of five buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', 'No Change, Continue To Review Step', and 'Proceed'. A red asterisk indicates a required field.

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



- IX. After clicking OK, the system will move to the next step, Bids – Review at which point the user can review the type(s) of electronic submission selected, if any, as well as the CLIN template created, if applicable. There are four options at the bottom of the review page:
  - a. Go Back takes the user to step five Bids – CLIN Template;
  - b. Save Draft saves the modification in draft notice;
  - c. Quit Process and Return does not save the modification;
  - d. Proceed saves any changes made to the Bids section and takes the user to the next step in the modification process.
- X. At step six, the user is able to review materials, and if appropriate to post the modification/amendment for vendor review; see section 3.3.2 page 53 for more information on this final step in the modification process.

**3.4.3 Manage Vendor Electronic Responses**

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

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

Location:

**PROCUREMENT NOTICE INFO**

Created: February 18, 2009 4  
 By: [Micki Buyer](#)  
 Modified: February 18, 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:





 No items found


- III. If available, vendor electronic response submissions will be displayed in spreadsheet fashion and will provide the following information:
- Vendor’s first and last name;
  - Vendor’s company name;
  - DUNS if available;
  - Type(s) of electronic submission;
  - Total Bid amount;
  - Date the response was submitted.

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

Keywords:

Batch Options ▾ Items 1-2 of 2

		Last Name ▾	First Name ▾	Contractor ▾	DUNS ▾	Type	Total Bid ▾	Submitted On ▾
<input type="checkbox"/>		Vendor	Micki	FBO Test Vendor		CLIN, Doc Package	2,500.00	Feb 21, 2009 10:12 pm
<input type="checkbox"/>		Vendor02	Micki	Test Vendor 2		CLIN, Doc Package	1,500.00	Feb 21, 2009 11:25 pm

- IV. Click on the View icon  to review the details of a vendor’s electronic response; the system will display two sub-tabs for each response submitted, Core and Notes:
- The Core sub-tab provides details of the response, including:
    - Additional contact information for the vendor, including full name, company name, email address, and telephone number;

[Notice Information](#)
[Packages](#)
[Bids/Responses](#)
[Interested Vendors](#)

---

[Core](#)
[Notes](#)

---

[Return](#)
[Create Award Notice](#)

### Response


**Contractor:**  
**Name:**  
 FBO Test Vendor  
**Doing Business As (DBA):**  
 FBO Test Vendor  
**Fullname:**  
 Micki Vendor  
**First Name:**  
 Micki  
**Last Name:**  
 Vendor  
**Email:**  
[\[Redacted\]](#)  
**Phone:**  
 5555551212

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

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

- 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;

Documents:


[Sample vendor bid response.docx](#) (9.66 Kb)  
 Test Response File

- 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;

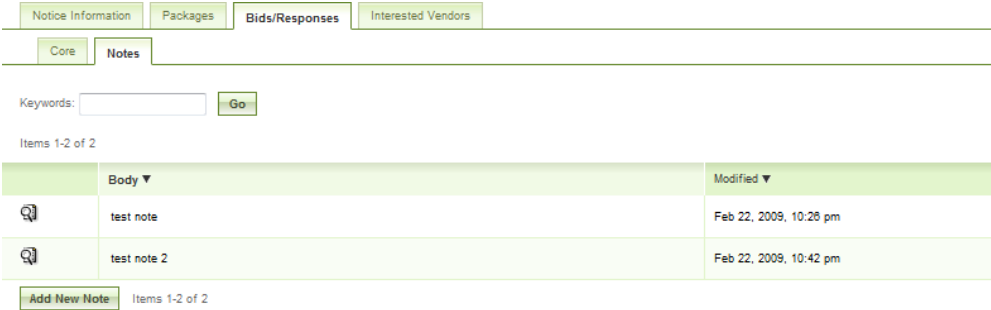
Notice Information Packages **Bids/Responses** Interested Vendors

Core **Notes**

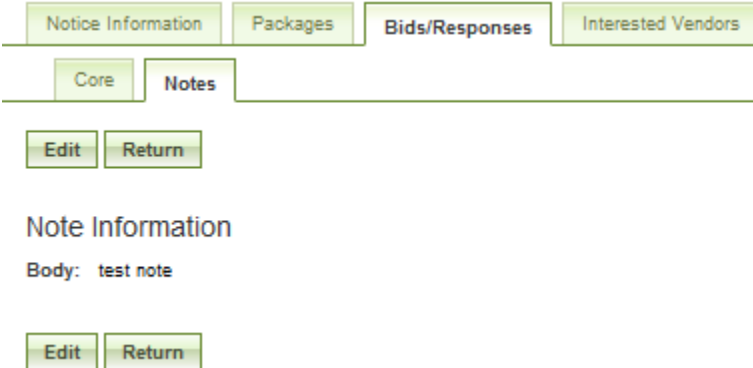
Note Information

Body\*:

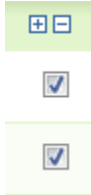
- 1. Submit saves the text entered and returns the user to the main Notes sub-tab listing all saved entries;
  - 2. Save saves the text entered and keeps the user within that particular note for review;
  - 3. Return does not save the text entered and returns the user to the main Notes sub-tab listing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



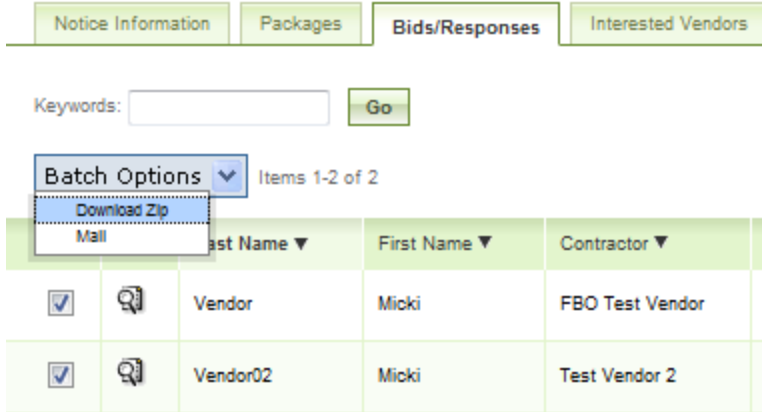
- v. The user can review the Note Information and make changes (or delete the note) by clicking on the Edit button; otherwise, the user clicks Return to go back to the main list of Notes for that response.



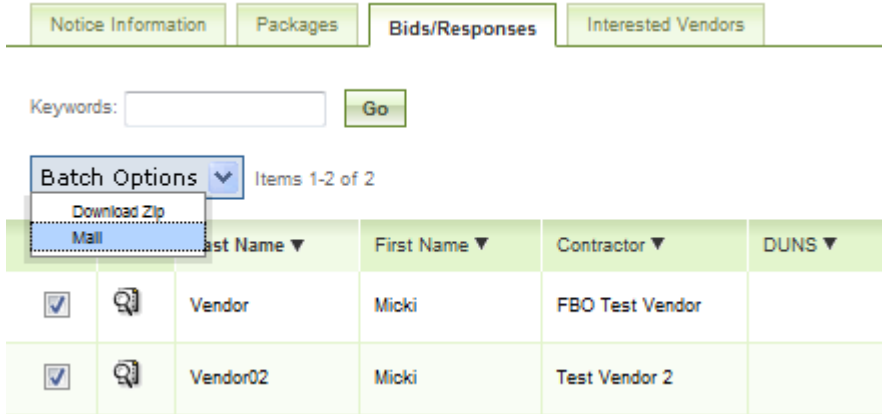
- V. A user can download all or a select number of vendor responses into a Zip file by following these steps:
- a. Within the Bids/Responses tab of a particular notice, select the responses to be downloaded using the checkboxes next to each response;
  - b. Note, to select (or deselect) all responses,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



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



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

Notice Information Packages Bids/Responses Interested Vendors  
Response List Mail Wizard

**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.

Cancel Next

**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

- 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.

AVAILABLE MERGE FIELDS  
[\[sol number\]](#)  
[\[agency\]](#)  
[\[office\]](#)  
[\[location\]](#)  
[\[vendor fullname\]](#)  
[\[vendor fname\]](#)  
[\[vendor lname\]](#)  
[\[vendor contractor name\]](#)  
[\[vendor contractor duns\]](#)  
  
[\[date\]](#)  
[\[tab\]](#)  
[\[system url\]](#)

- 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;

Attachment(s):

File:

Send Method:

include in email  send as link

- 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

Notice Information Packages Bids/Responses Interested Vendors

Response List Mail Wizard


**STEP 2: Review Recipients**  
Please review the list of recipients below, and make any desired changes.

m.....@s.....y.com

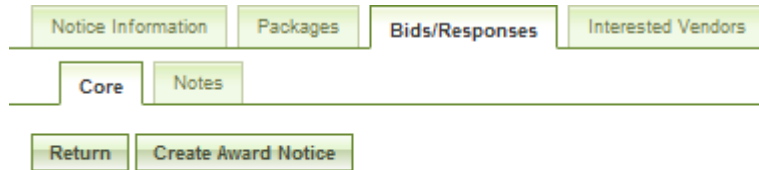
**WARNING:** When you click 'Send Messages', the mailing will begin. This is your last chance to change your mind or make any corrections.

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

### 3.4.4 Create Award

- I. From any page on the system, a user can go to upper navigation Notices button and then use the create award button to add an award to the notice. Look for:
  -  (see section 3.3.3 page 54 for screen shot).
- II. Additionally, a user can use the quicklink create award on their My FBO page to modify / amend a notice.
- III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.
- IV. If the Bid Module is enabled for a user's notice and there are vendor electronic responses submitted, the user can also initiate the award process directly from the

Core sub-tab of an electronic response by clicking on the Create Award Notice button. (Note, this button will only be present if the notice is eligible for award.)



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

### **3.4.5 Cancel Notice**

See section 3.3.4.

### **3.4.6 Deletion of Draft Notices**

See section 3.3.5.

### **3.4.7 Archive Notices**

See section 3.3.6.

### **3.4.8 Unarchive Notices**

See section 3.3.7.

### **3.4.9 Print Notices**

See section 3.3.8.

### **3.4.10 Review Interested Vendors List**

See section 3.3.9.

## **3.5 Non-FBO Secure Document Link**

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

### 3.5.1 Create Non-FBO Secure Document Link

- I. From notices tab, go to Non-FBO Solicitation sub-tab to see list of Non-FBO Solicitations.
- II. Red x in the released column indicates the Non-FBO solicitation is in draft format (not released yet). A date in this column means the Non-FBO solicitation was released on this date.
- III. Click Add New Non-FBO Solicitation to create a new Non-FBO solicitation link.

Business Opportunities

IAE E-GOV USA.gov

My FBO My Profile Notices Document Packages

Welcome, Admin User Accessibility User Guide Logout

## Non-FBO Solicitations

RETURN

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

Solicitations Archived

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

Items 1-6 of 6

Actions	Sol/Ref # ▼	Created on ▼	Released ▼
	GS02P08PWC0018	Apr 07, 2008 4:18 pm	<b>x</b>
	GS0507SVC0022	Apr 10, 2008 5:02 pm	Jul 06, 2007 5:09 am
	GS06P08GYC0005	Apr 10, 2008 5:02 pm	Jan 25, 2008 3:44 am
	GS06P08GYC0004	Feb 06, 2008 2:00 am	Feb 06, 2008 2:00 am
	GS06P08GZCUU4	Apr 01, 2008 4:52 pm	Feb 27, 2008 10:00 am
	GS06P08GZC0009	Apr 01, 2008 4:52 pm	Feb 28, 2008 11:30 am

[Add New Non-FBO Solicitation](#) Items 1-6 of 6

- I. The first step of creating a Non-FBO Secure Document Link is essentially a simplified version of the notice form. This form only captures three key elements:
  - i. the archive date
  - ii. point of contact(s)
  - iii. solicitation #.
- II. Note, solicitation # and archive date must be entered before the save draft button can be used to save the Non-FBO Solicitation in draft format.
- III. Cancel returns the user to the list of Non-FBO Solicitations.
- IV. Proceed takes the user to the next step in the process.

Non-FBO Solicitation: nonfbo123

- 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.

\* Indicates a required field

### Solicitation Details

Please enter the details for this non-fbo solicitation

**Solicitation #:** Enter the solicitation number  
nonfbo123

**Primary Point of Contact\*:** Select the primary point of contact  
Select an Existing or New Contact:  
 ▼

Title:

Full Name:

Email:

Phone:

Fax:

**Secondary Point of Contact:** Optionally, select a secondary point of contact.  
Select an Existing or New Contact:  
 ▼

Title:

Full Name:

Email:

Phone:

Fax:

**Archive Date\*:** The date this solicitation and packages will be archived

- I. The next step of creating a Non-FBO form allows the user to add the secured package(s).
- II. The user can create new or attach/select existing secured package.
- III. Contingent on the response, the system will prompt users to enter data as appropriate.
- IV. Use the Attach Additional Secure Package button to add additional packages to the Non-FBO Solicitation.
- V. Go Back takes the user back one step in the process.
- VI. Use the save draft button to save the Non-FBO Solicitation in draft format.
- VII. Cancel returns the user to the list of Non-FBO Solicitations.
- VIII. Proceed & Review takes the user to the final step in the process.



- I. The final step of creating a Non-FBO allows the user to review and submit materials.
- II. Go Back takes the user back one step in the process.
- III. Use the Save Draft button to save the Non-FBO Solicitation in draft format.
- IV. Quit Process and Return returns the user to the list of Non-FBO Solicitations
- V. Release Solicitation makes the Non-FBO solicitation link valid. Users will be asked to confirm release.

**FEDBIZOPPS.GOV** Federal Business Opportunities

IAE E-GOV USA.gov

My FBO My Profile Notices Document Packages

Welcome, nancy both - test section Accessibility User Guide Logout

### [New Non-FBO Solicitation]

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

#### Solicitation Details

**Solicitation #:**  
asdfasldsf

**Primary Point of Contact:**  
nancy both,  
Supervisor BUyer  
[test-1@symplicity.com](mailto:test-1@symplicity.com)[test-13@symplicity.com](mailto:test-13@symplicity.com)  
Phone: 512 555 66677

**Archive Date:**  
April 30, 2008

#### Attach Packages

**Package #1**

PR #: newpar3iou  
Is this Export Controlled?: yes  
Explicit Access: no

---

[tiffany.txt](#) (74.46 Kb)  
Description: tset

- I. The link for the Non-FBO solicitation is presented in the notice when it is released.
- II. Vendors must log in after clicking that link and will see the uploaded packages - and can request access etc, same way they would for FBO Solicitation. Users will manage explicit access requests in the same way as described for FBO solicitations.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below this is a user welcome message: 'Welcome, nancy both - test section' with links for 'Accessibility', 'User Guide', and 'Logout'. The main heading is 'Non-FBO Solicitation: 32608' with links to 'RETURN' and 'RETURN TO LIST (NONFBO)'. A secondary navigation bar contains 'Procurement Notices', 'Drafts', 'Archived', and 'Non-FBO Solicitations'. Underneath, there are tabs for 'Details' and 'Authorized Parties'. Action buttons include 'Unrelease Solicitation', 'Return', and 'Archive'. The 'Solicitation Details' section lists: Solicitation #: 32608; Primary Point of Contact: nancy cybil (cybill@g.gov); Secondary Point of Contact: nancy office five (test-4@symplicity.com); Archive Date: April 25, 2008; Vendor Link: https://fbo-test.symplicity.com/fedteds/32608. A 'Package #1' section shows PR #: 235687, Is this Export Controlled?: no, Explicit Access: yes, and Is CD Available: no. A 'NON-FBO SOLICITATION INFO' sidebar on the right shows creation and modification dates and user information.

### 3.5.2 Un-release Non-FBO Secure Document Link

- I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional. Vendors trying to view the link of an unreleased Non-FBO solicitation will receive the following error message:  
NOTE: The Secure Documents link (formerly FedTeDS) you are trying to access cannot be found
- II. Un-released Non-FBO solicitations are returned to draft status on the list of Non-FBO solicitations. On that list, in the released date, a red x will display.
- III. To unrelease a previously released Non-FBO document, go to Notices and the Non-FBO Solicitations sub-tab. Click on the review tab to open the previously released item.

[Procurement Notices](#)
[Drafts](#)
[Archived](#)
**Non-FBO Solicitations**

[Solicitations](#)
[Archived](#)

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

Items 1-6 of 6

Actions	Sol/Ref # ▼	Created on ▼	Released ▼
	GS02P08PWC0018	Apr 07, 2008 4:18 pm	<b>x</b>
	GS0507SVC0022	Apr 10, 2008 5:02 pm	Jul 06, 2007 5:09 am
	GS06P08GYC0005	Apr 10, 2008 5:02 pm	Jan 25, 2008 3:44 am
	GS06P08GYC0004	Feb 06, 2008 2:00 am	Feb 06, 2008 2:00 am
	GS06P08GZC0004	Apr 01, 2008 4:52 pm	Feb 27, 2008 10:00 am
	GS06P08GZC0009	Apr 01, 2008 4:52 pm	Feb 28, 2008 11:30 am

[Add New Non-FBO Solicitation](#)
Items 1-6 of 6



- 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

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below this is a header area with the site logo and 'Federal Business Opportunities' text. A secondary navigation bar contains 'Procurement Notices', 'Archived', and 'Non-FBO Solicitations'. The main content area is titled 'Non-FBO Solicitation: 58979' and includes a breadcrumb trail 'RETURN | RETURN TO LIST (NONFBO)'. Below the title are tabs for 'Details' and 'Authorized Parties'. A row of buttons includes 'Unrelease Solicitation', 'Archive', and 'Return'. The 'Solicitation Details' section lists: Solicitation #: 58979, Primary Point of Contact: nancy both (test-1@symplcity.com), Archive Date: March 31, 2008, and Vendor Link: https://fbo-test.symplcity.com/fedteds/58979. An 'Attach Packages' section shows 'Package #1' with PR #: 14785, 'Is this Export Controlled?: no', and 'Explicit Access: yes'. A PDF file 'fbo buyer guide1.pdf' (4,587.53 Kb) is listed with the description 'testing'. A sidebar on the right contains 'NON-FBO SOLICITATION INFO' with 'Created: March 25, 2008 6:08 pm' and 'Modified: March 25, 2008 6:08 pm' by user 'nancy both'. A second row of 'Unrelease Solicitation', 'Archive', and 'Return' buttons is at the bottom of the main content area.

### 3.5.3 Delete Draft Non-FBO Secure Document Link

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

Business Opportunities

IAE E-GOV USA.gov

My FBO My Profile Notices Document Packages

Welcome, Admin User Accessibility User Guide Logout

## Non-FBO Solicitations

RETURN

Procurement Notices Drafts Archived Non-FBO Solicitations

Solicitations Archived

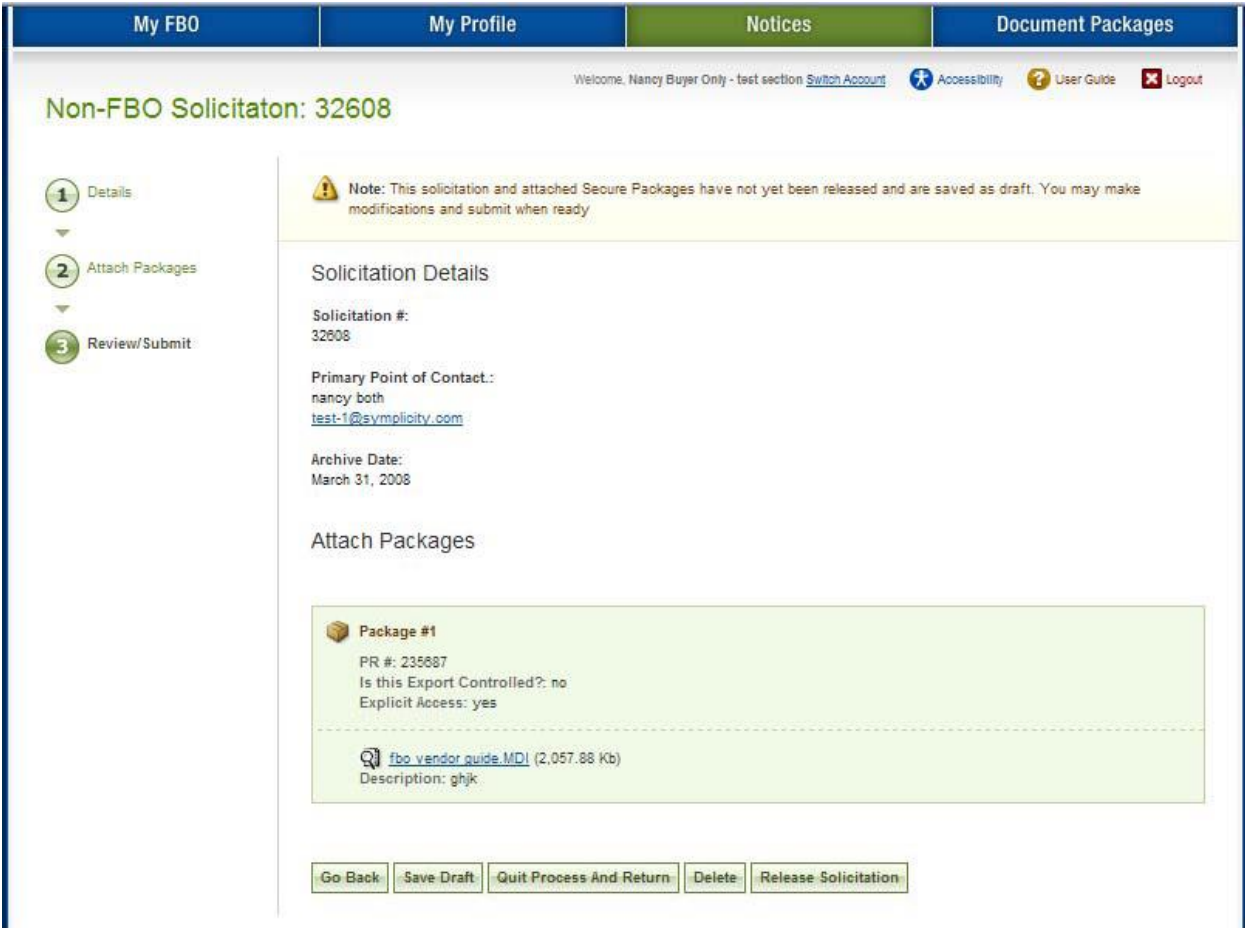
Keywords:  More Go Clear

Items 1-6 of 6

Actions	Sol/Ref # ▼	Created on ▼	Released ▼
	GS02P08PWC0018	Apr 07, 2008 4:18 pm	<b>x</b>
	GS0507SVC0022	Apr 10, 2008 5:02 pm	Jul 06, 2007 5:09 am
	GS06P08GYC0005	Apr 10, 2008 5:02 pm	Jan 25, 2008 3:44 am
	GS06P08GYC0004	Feb 06, 2008 2:00 am	Feb 06, 2008 2:00 am
	GS06P08GZC0004	Apr 01, 2008 4:52 pm	Feb 27, 2008 10:00 am
	GS06P08GZC0009	Apr 01, 2008 4:52 pm	Feb 28, 2008 11:30 am

Add New Non-FBO Solicitation Items 1-6 of 6

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

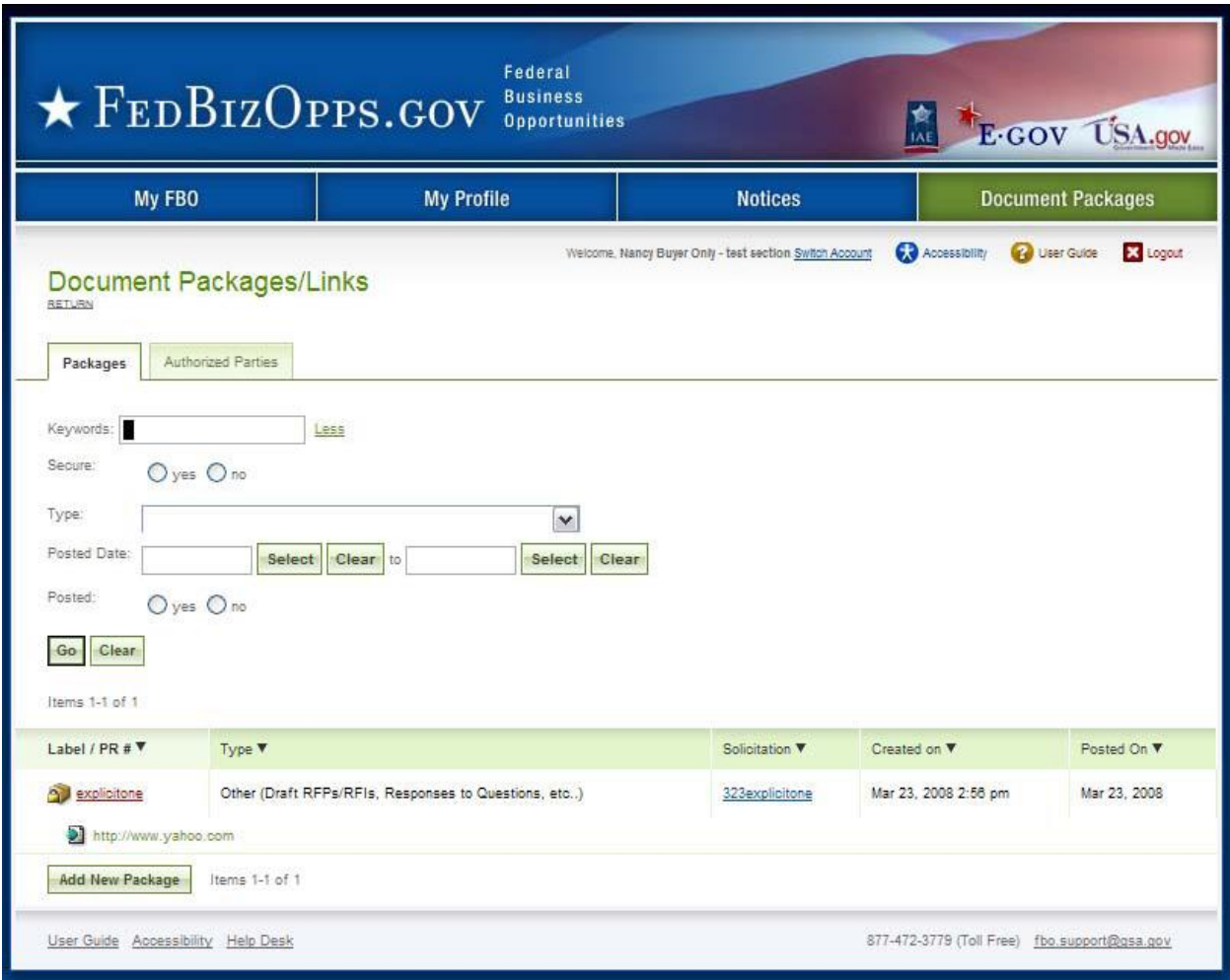


### 3.6 Manage Document Packages

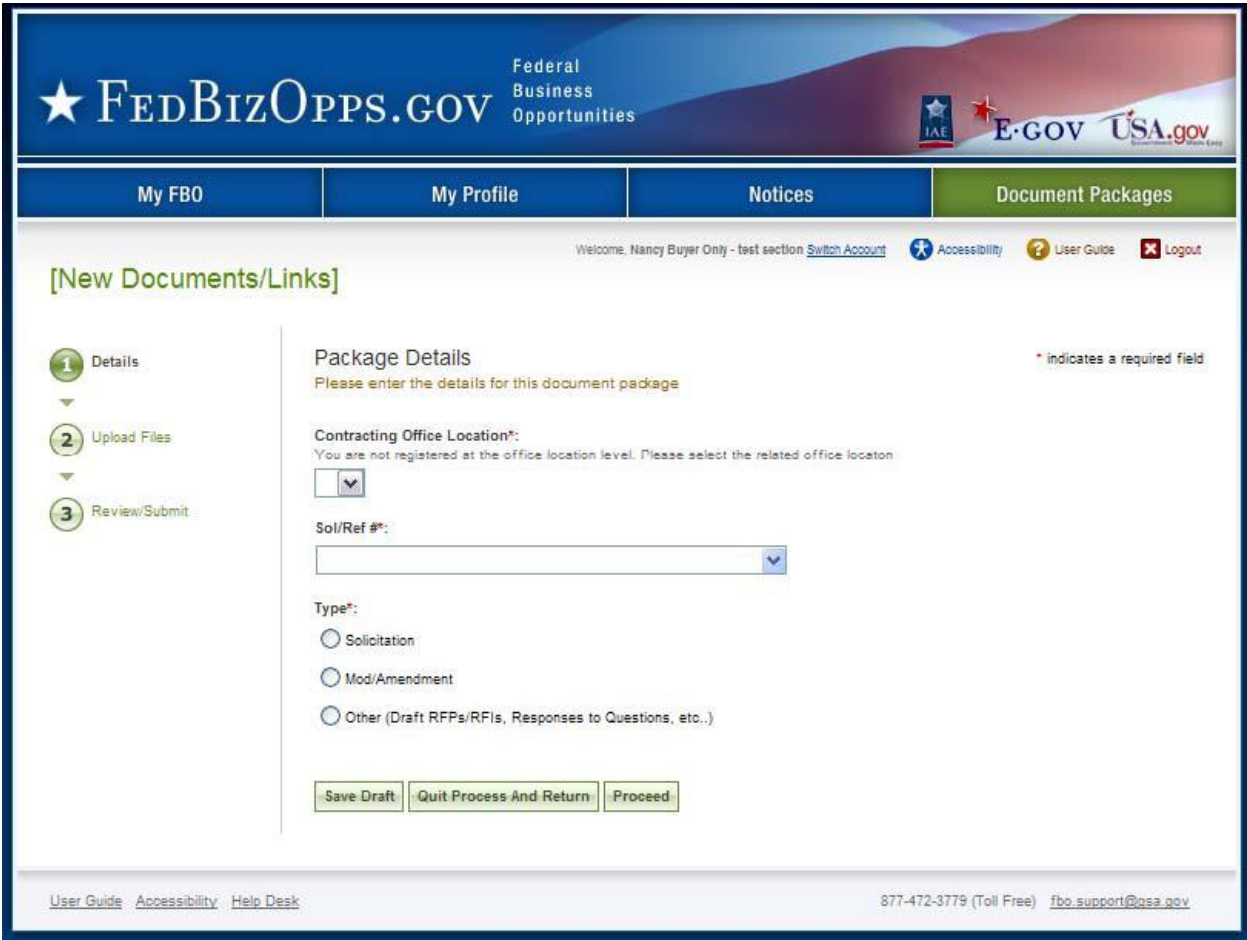
(outside context of FBO Notice Creation)

#### 3.6.1 Add New Document Package to Existing Notice

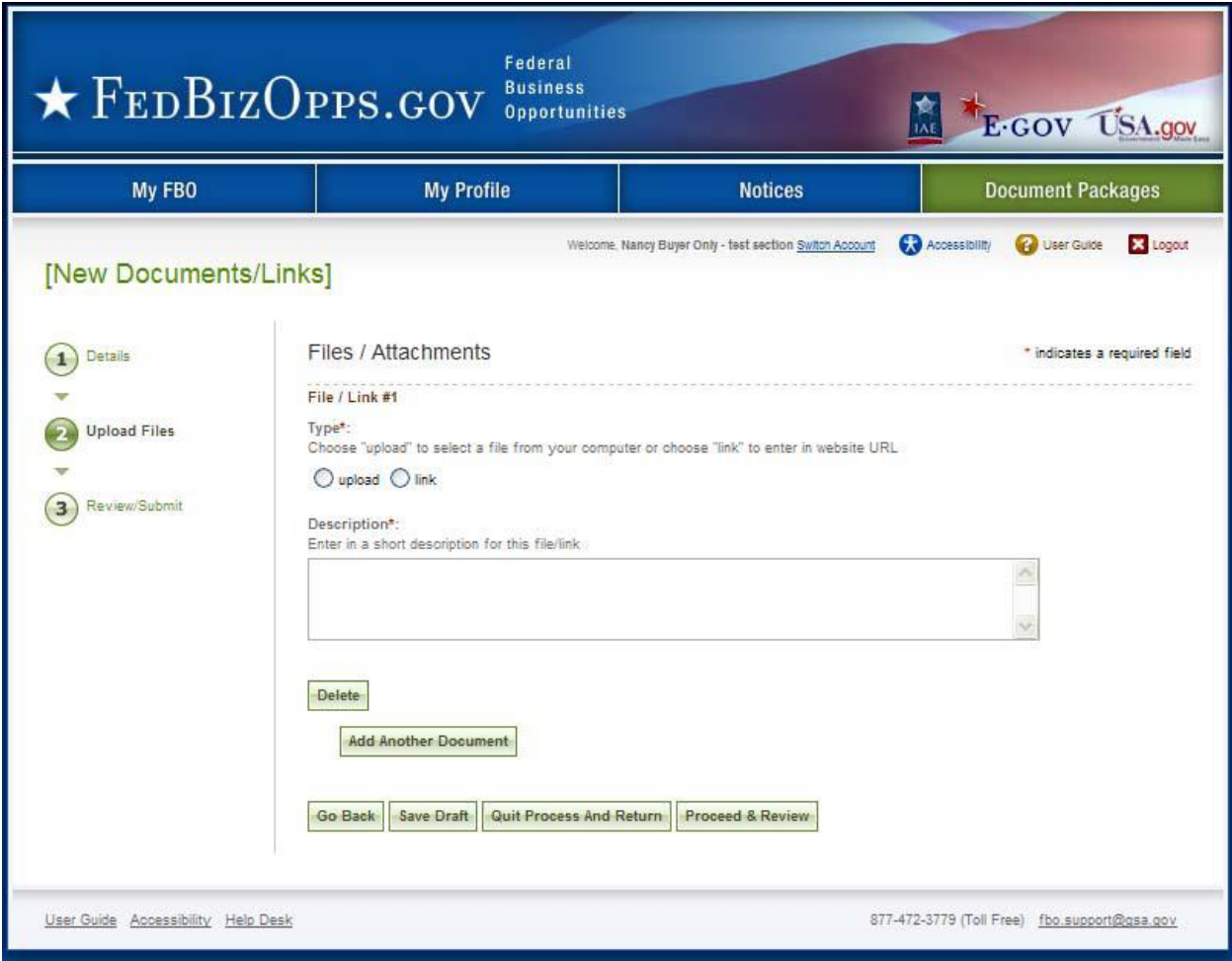
- I. From the Document / Links main navigation, users can create, and assign new documents to released solicitations.
- II. Use the add new button.
- III. Additionally, a user can use the quicklink upload new docs/links on their My FBO page to add a new package.
- IV. Note, if you create a new document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



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




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



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

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

 **Note:** This package is not tied to a solicitation. Please click [release] now to make it available for solicitation attachments.

### Package Details

**Is this a secure/sensitive package?:**  
yes

**Is the related solicitation on FBO:**  
no

**Label:**  
Mod/Amendment (Draft)

**PR #:**  
12345678912


**Is this Export Controlled?:**  
no

**Explicit Access:**  
no

**Is CD Available:**  
no

### Files / Attachments

---

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

Go BackSave DraftQuit Process And ReturnRelease Package

### 3.6.2 Edit Document Package

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

[My FBO](#) | [My Profile](#) | [Notices](#) | [Document Packages](#)

Welcome, nancy both - test section | [Accessibility](#) | [User Guide](#) | [Logout](#)

## Document Packages/Links

[RETURN TO PROCUREMENT](#)

[Packages](#) | [Authorized Parties](#)

Keywords:  [More](#)

Items 1-20 of 57      Showing  per page    Jump  | [Next >](#)

Label / PR # ▼	Type ▼	Solicitation ▼	Created on ▼	Posted On ▼
<a href="#">123456</a> <a href="#">More stuff</a>	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	<a href="#">123456456</a>	Mar 25, 2008 10:02 am	Mar 25, 2008
<a href="#">123aa</a> <a href="#">tes</a>	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008
<a href="#">14785</a> <a href="#">testinn</a>	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	<a href="#">58979</a>	Mar 25, 2008 4:02 pm	Mar 25, 2008

[My FBO](#) | [My Profile](#) | [Notices](#) | [Document Packages](#)

Welcome, nancy both - test section | [Accessibility](#) | [User Guide](#) | [Logout](#)

## test414

[RETURN](#) | [RETURN TO LIST \(DOCUMENT\\_PACKAGE\)](#)

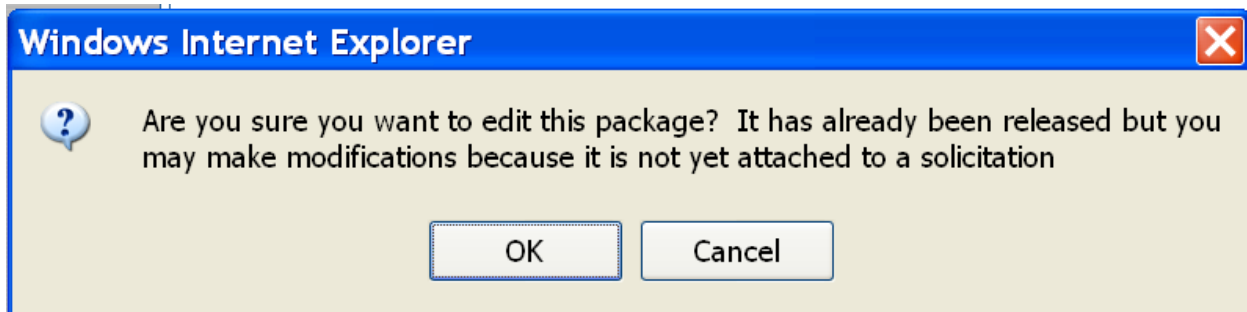
[Details](#) | [Audit Trail](#)

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

Contracting Office Location: 5  
Is this a secure/sensitive package?: yes



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



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

### 3.6.3 Delete Document Package

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

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My FBO My Profile Notices Document Packages

Welcome, nancy both - test section Accessibility User Guide Logout

### Document Packages/Links

RETURN TO PROCUREMENT

Packages Authorized Parties

Keywords:  More Go

Items 1-20 of 57 Showing 20 per page Jump 1 Next >

Label / PR #	Type	Solicitation	Created on	Posted On
<a href="#">123456</a> More stuff	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	<a href="#">123456456</a>	Mar 25, 2008 10:02 am	Mar 25, 2008
<a href="#">123aa</a> tes	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	[Unassigned]	Mar 29, 2008 1:19 pm	Apr 14, 2008

### Mod/Amendment (Draft)

RETURN TO DOCUMENT PACKAGES/LINKS RETURN TO LIST (DOCUMENT PACKAGES/LINKS)

Details Audit Trail

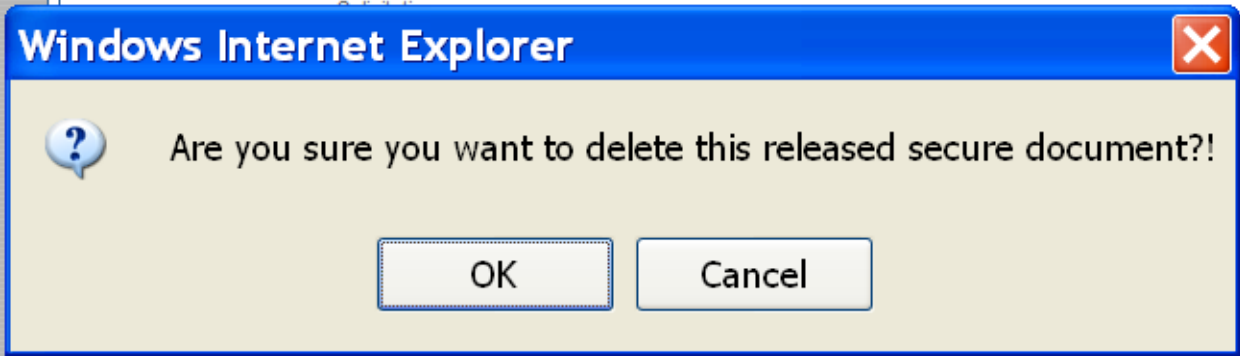
**Note:** This is a controlled unclassified document package.

Return Delete Edit

Is this a secure/sensitive package?: yes

Is the related solicitation on FBO: no

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



### 3.6.4 Manage Explicit Access Requests

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

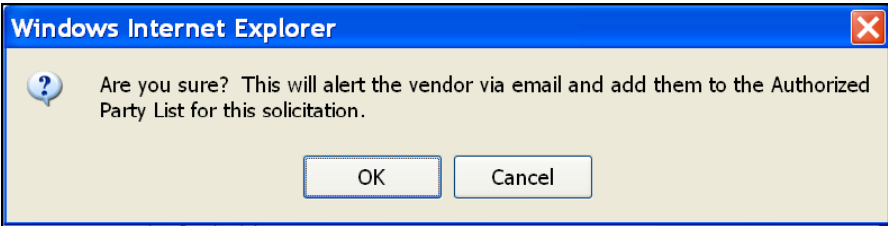


- I. The authorized parties list is divided into three sub-tabs: pending requests, authorized, and rejected requests.
- II. To review a pending request, click on the review icon for the request record.

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below this, a header area displays 'Document Packages/Links' and a search bar. The search results are filtered by 'Authorized Parties' and 'Pending Requests'. A table lists one authorized party: 'OPTOMETRICS CORPORATION' with contact information and identifiers.

Actions	Sol/Ref # ▼	Last Name ▼	First Name ▼	Email	Contractor ▼	DUNS ▼	Cage # ▼
	estatate	export	nancy	nancyexport@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.



My FBO | My Profile | Notices | Document Packages

Welcome, Nancy Buyer Only - test section [Switch Account](#) | [Accessibility](#) | [User Guide](#) | [Logout](#)

### Approve/Reject Request

[RETURN](#) | [RETURN TO LIST \(AUTHORIZED\)](#)

Packages | Authorized Parties

**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.

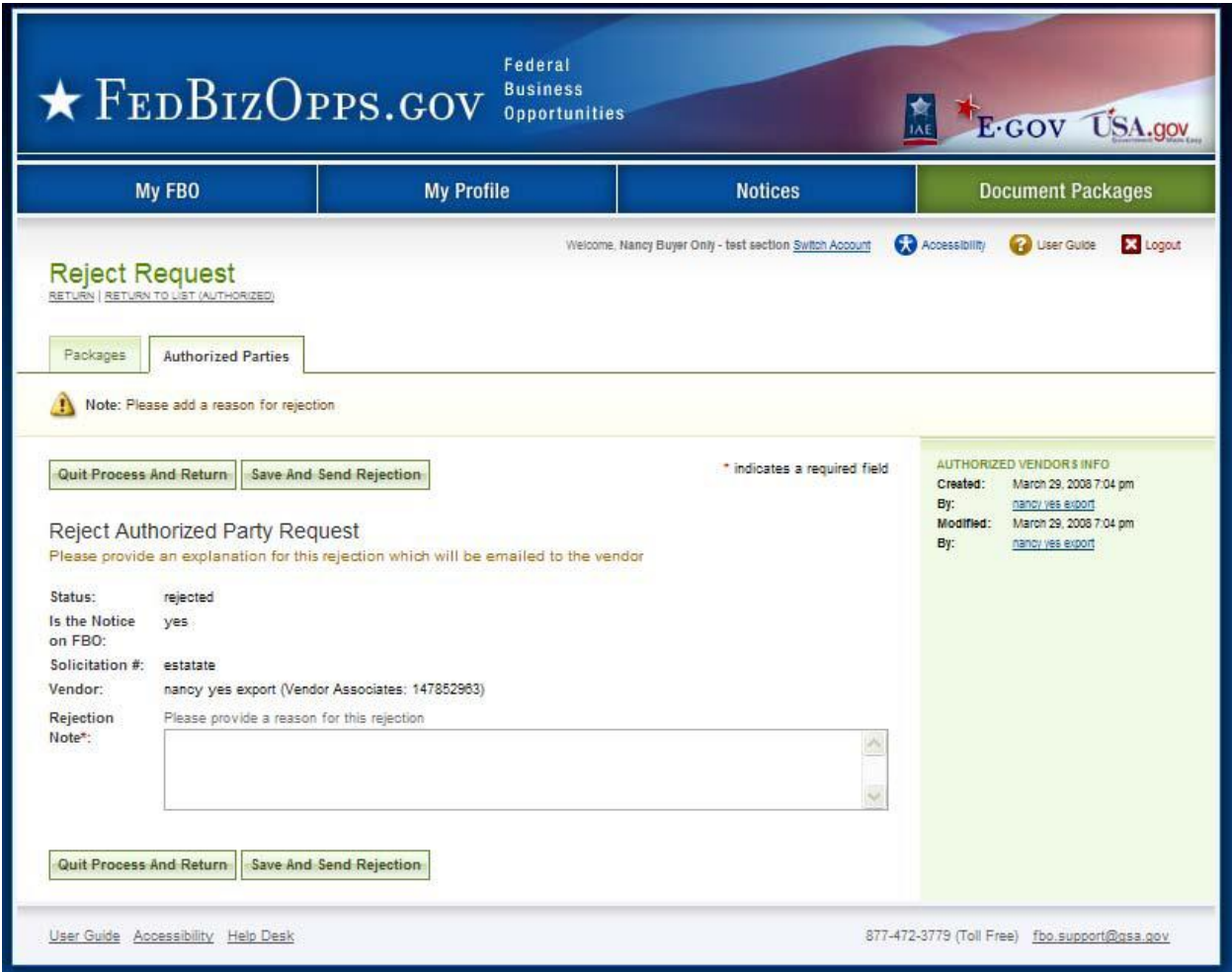
[Approve](#) | [Reject](#) | [Quit Process And Return](#)

#### Pending Explicit Access Request

Status: pending  
Is the Notice on FBO: yes  
Solicitation #: estate  
Vendor:  
Contractor:  
DUNS #: 001002138  
Name: OPTOMETRICS CORPORATION  
Cage #: 1X8K5  
Fullname: nancy yes export  
First Name: nancy  
Middle Name: yes  
Last Name: export  
Email: [nancyexport@symplicity.com](mailto:nancyexport@symplicity.com)  
Phone:

**AUTHORIZED VENDOR'S INFO**  
Created: March 29, 2008 7:04 pm  
By: [nancy yes export](#)  
Modified: March 29, 2008 7:04 pm  
By: [nancy yes export](#)

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



### 3.6.5 Review Authorized / Rejected Explicit Access Requests

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

The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. Below this, a user is logged in as 'nancy both - test section'. The main heading is '417buyersol - 78979a8sd7f: Authorized Parties'. There are several sub-tabs: 'Notice Information', 'Packages', and 'Interested Vendors'. Under 'Packages', there are sub-tabs for 'Packages', 'Authorized Parties', and 'Rejected Requests'. The 'Authorized Parties' sub-tab is active, showing a search bar with 'Keywords:' and a 'Go' button. Below the search bar, it says 'Items 1-1 of 1'. A table lists the authorized party:

Actions	Last Name ▼	First Name ▼	Email	Contractor ▼	DUNS ▼	Cage # ▼
	Kern	Doug	<a href="mailto:agocity@symplicity.com">agocity@symplicity.com</a>	nancy's import export	000002222	XXXXY

At the bottom of the table, there is an 'Add Authorized Party' button and the text 'Items 1-1 of 1'.



### 3.6.6 Document Audit Trail

- I. For controlled, unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the audit trail sub-tab of a released document.
- II. Go to main navigation Document Packages.
- III. For the document package you would like to review, click on the package link (not the actual document file link(s)).

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My FBO My Profile Notices Document Packages

Welcome, nancy both - test section Accessibility User Guide Logout

### Document Packages/Links

RETURN

Packages Authorized Parties

Keywords: 3 More Go Clear

Items 1-3 of 3

Label / PR #	Type	Solicitation	Created on	Posted On
3.23explicit asdf	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	testexport	Mar 23, 2008 12:52 pm	Mar 23, 2008
76767 ts	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	a6dsf76afd87	Mar 25, 2008 5:35 pm	Mar 25, 2008
97g98e7r old kitchen	Other (Draft RFPs/RFIs, Responses to Questions, etc..)	a6dsf76afd87	Mar 25, 2008 5:35 pm	Mar 25, 2008

Add New Package Items 1-3 of 3

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



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

**My FBO** | **My Profile** | **Notices** | **Document Packages**

Welcome, Nancy Buyer Only - test section [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

### Audit Trail - PR # explicitone: 323explicitone

[RETURN](#) | [RETURN TO LIST](#) | [LOG](#)

[Details](#) | [Audit Trail](#)

[Return](#)

#### Secure Package Log

PR #: explicitone  
Sol/Ref #: 323explicitone  
Filename: package.zip  
Vendor: Contractor:  
DUNS #: 001001888  
Name: LOEB, H CORP  
Doing Business As (DBA): LOEB  
Cage #: 3X4W6  
Title: Mr  
Fullname: Alan Vendor  
Email: [test10@symplicity.com](mailto:test10@symplicity.com)  
Phone: 201-874-7854  
Action: download  
Action Occured On: Mar 23, 2008 3:35 pm  
IP Address: 66.108.204.235

[Return](#)

#### SECURE DOCUMENT LOG INFO

Created: March 23, 2008 3:35 pm  
By: [Alan Vendor](#)  
Modified: March 23, 2008 3:35 pm  
By: [Alan Vendor](#)