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:
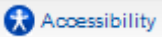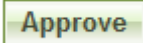
- Vendor Profile: Vendors maintain profiles in the system, streamlining use of the portal. Among other profile elements, the following key vendor information is maintained in their profile:
    - DUNS (Data Universal Numbering System) Number
    - Commercial and Government Entity (CAGE) Code
    - MPIN (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
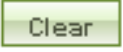   - J&A Statutory Authority

  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).
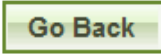
- Opportunity Actions: Vendors are able to add themselves to the Interested Vendors List (IVL) for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors 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.*
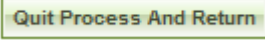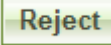
1.1 Definition of key terms
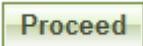
Below is a list of key terms and how they are used throughout the system.

| 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	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 pro-actively select a vendor user for access, or a vendor can request, and be granted access, through this system.
Export Controlled	n/a	Export Controlled access level requires that the vendor's company be certified by the 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	Go	If data is entered in keyword search filter, select the Go button to submit the request.
Go Back	Go Back	During a stepwise process, use of the go back button takes the user back one step in the process.
Help	Help or ?	Throughout the system, the system presents users with the opportunity review system Help messages. The icons presented here will take the users to the help message that is available.
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). *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.*
Log-in	Login	Use username and password to logon to an account on the system
Logout	Logout	The Logout button can be used to log the user off the system.
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	Post	Finalizes a Notice and posts the notice on the system for vendor review.
Proceed	Proceed	The Proceed button saves the entered data on a form and takes the user to the next step (first prompting users to complete required fields on the form).
Quicklink	n/a	A quicklink is a system navigational option that if selected takes a user to a specific action on the site.
Quit Process and Return	Quit Process And Return	The quit process and return button returns the user to the previous page, without updating any record fields.
Register	▶ Register Now	Request a user account on the system.
Reject	Reject	The Reject button is used to reject a vendor's request for explicit access to controlled, unclassified documents.
Release Package	Release Package	Finalizes a Package and releases for use by a buyer.
Required Field	*	A red asterisk next to a field label indicates that the field is a required.
Return	Return	The return button returns the user to the navigation.
Review or view		Review opens an object for review.
Save	Save	The Save button saves the entered data on the form. User will be required to complete all required fields on the form.
Save Draft	Save Draft	The Save Draft button saves the entered data in a draft document, (user is not required to complete required fields on the form).
Search Agent	n/a	Vendors can set up search agents based on selected detailed search elements. Search agents can be run on an ad hoc or scheduled basis to highlight newly filed opportunities which align with the designated

		search criteria.
Controlled, Unclassified Document	n/a	Vendors are required to logon to the system and to have a valid MPIN on file, to review controlled, unclassified documents. Export Controlled and explicit access are more stringent access controls that may also apply to controlled, unclassified documents.
Spell Check		Certain text entry fields offer spell check tool that is indicated by this icon.
Sub-tab	n/a	These are sections of a main navigation that a user can move to while in that main navigation (e.g., my profile is a main navigation, and account and contact information are sub-tabs in that main navigation).
Switch Accounts		Because some buyers are associated with multiple agencies/offices, they will have multiple accounts tied to their username. Users having multiple associations can switch between accounts by using the switch account tool
Username	n/a	All users will have one username. The username is used to log into the system.
Vendor	n/a	Provider of services.
Watched List	Watched	Designation that vendor can set on a notice that saves the notice on a sub-tab list of notices. The watched list is easily accessed with a quick .

2 Logging onto the System

2.1 System URL

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

2.2 Navigation Bar on Logon Page – Unsecured features

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

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

2.3 Register for an Account

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

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

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

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

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

☐ Buyer ☐ Engineer ☐ Office Location Administrator

Username*:
Please choose your login username now

Desired Password*:
Enter the password you wish to use to gain access to the system.
For security purposes, the password must meet the following criteria:
1. Must be between 8 and 14 characters
2. Must contain **all of the following**:
   - 1 lower case letters
   - 1 upper case letters
   - 1 numbers
   - 1 special characters (e.g. !, %,^)

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

[Go Back] [Cancel] [Proceed & Review]

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

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

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

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

2.4 Returning Users – Log into the system

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

2.4.1   Captcha Security

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

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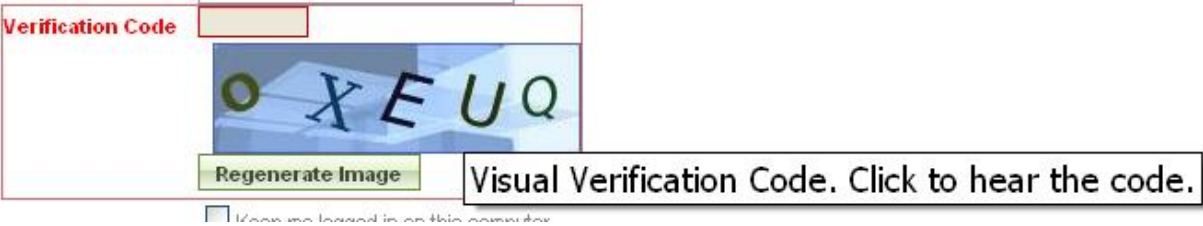
2.4.2 FBO Terms and Conditions

I. All users are required to review and to agree to FBO Terms and Conditions which are presented after a user has entered correct username and password data.

II. To agree to the terms and conditions, select accept. If you do not consent to the conditions stated, select decline. Decline logs the user off the system.

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

Accept   Decline

3 Buyer's Secured Interface

3.1 session time out

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

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

3.2 Main Navigation

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

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

3.2.1 My FBO

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

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

3.2.2   Multi-account Users

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

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

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

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

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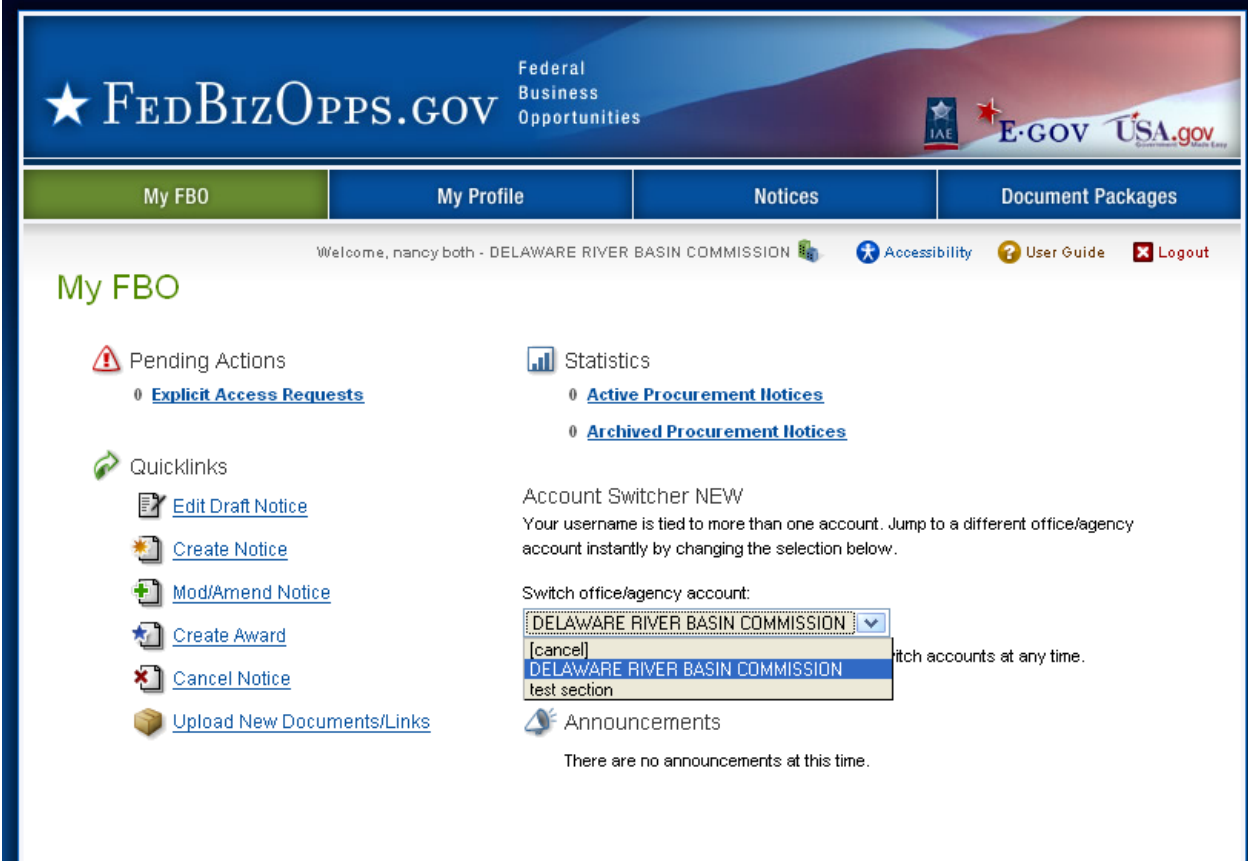
Option to switch shows on top of page of other pages in the site:

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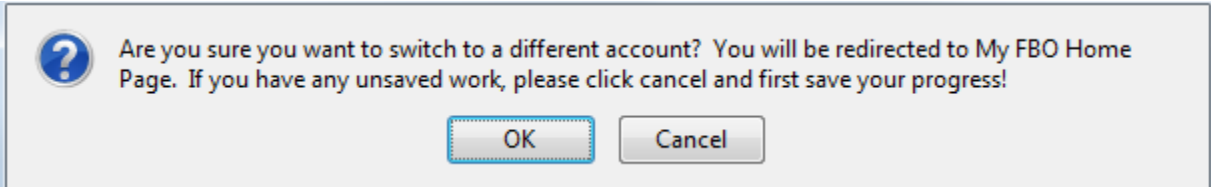
3.2.3 My Profile

I.   There are two sub-tabs on the user's My Profile page (which are tied to an account profile). On these sub-tabs the user is able to update contact information and account data.

II. Agency, Office and Role information is show on the right section of this page. **Note**, the information reflected here determines which opportunities a buyer is able to manage on their account's secured interface. Buyers will manage opportunities that are aligned with their agency/office location branch of the organization.

III. From the contact information tab, select the edit to changes contact fields.
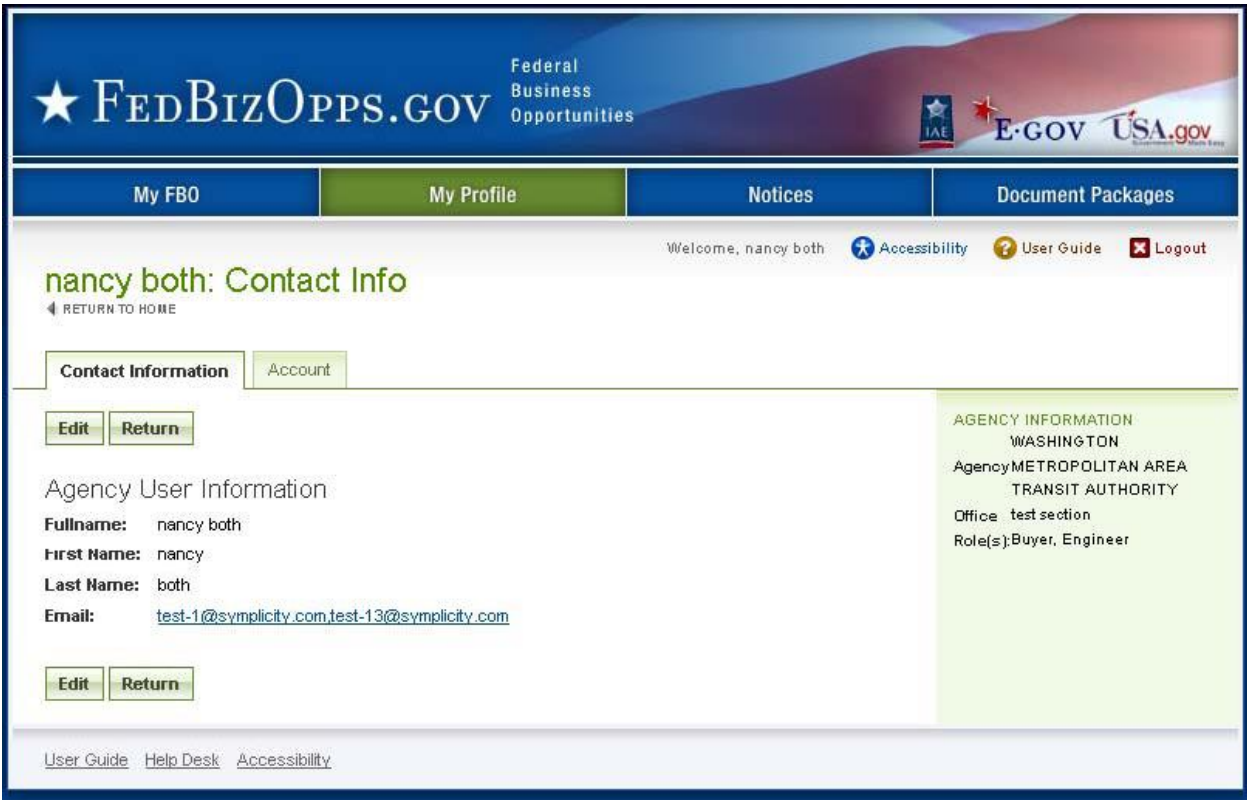
I. Enter field changes as desired. Select save to save updates to the form.

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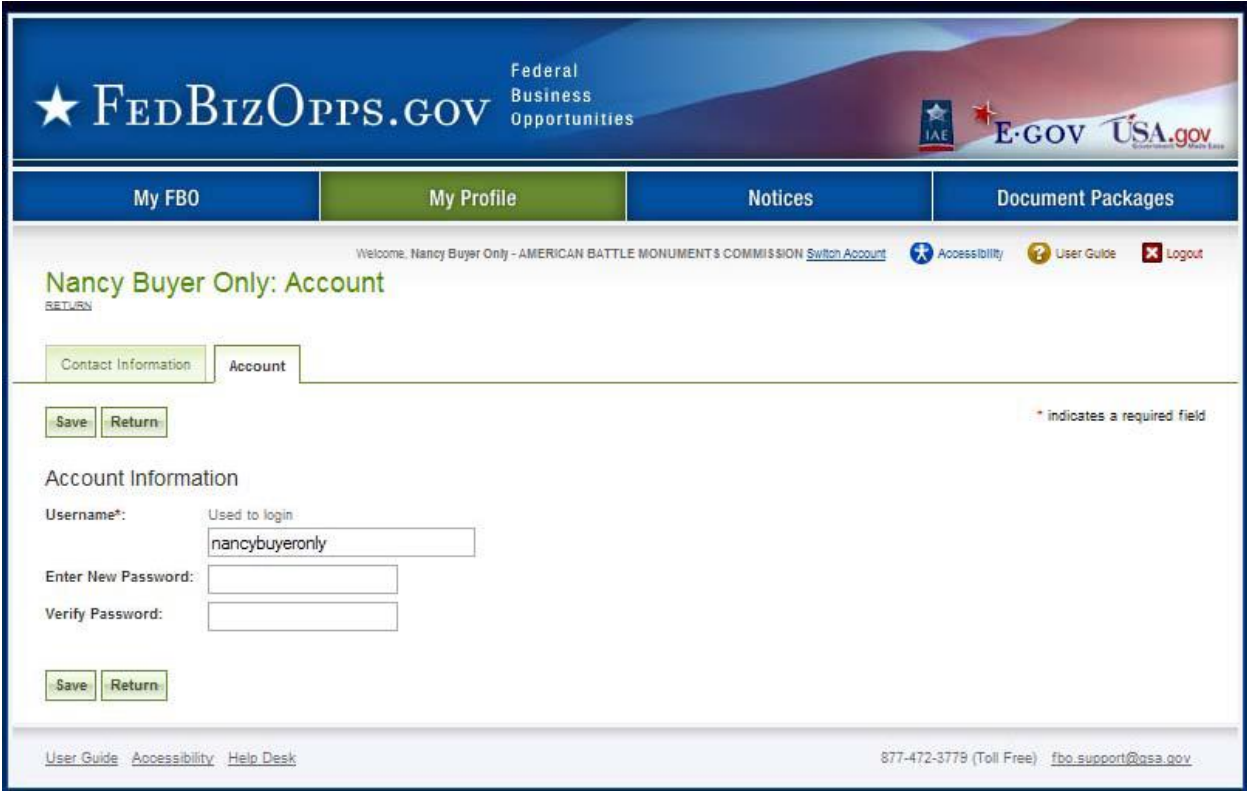
3.2.4 Procurement Notices

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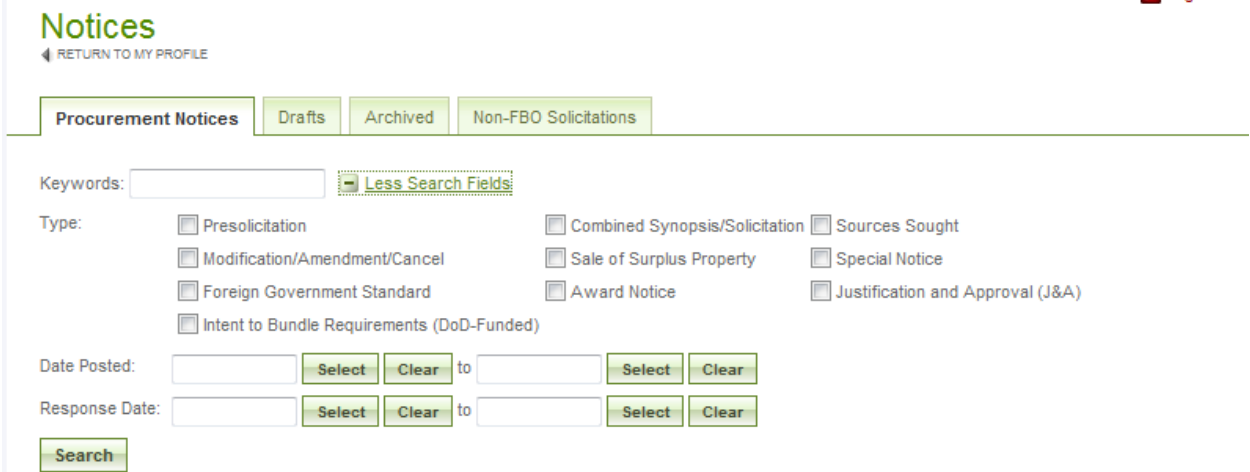
3.2.5   Document Packages

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

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

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

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

3.3 Manage FBO Notices

3.3.1   Create Notice

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

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

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

Step 1 – NOTICE TYPE

The first step establishes the following fields for the Notice:

I.   Agency/Office – will be preset to a particular user's agency if that user is only affiliated with one agency.

II.   Contracting Office Location– may be preset to a particular user's agency if that user is only affiliated with one location.

III.   Type

IV.   Solicitation Number

V.   Note, data entered in step 1 cannot be edited later. Care should be taken to ensure accuracy of data entered.

VI.   Select proceed to move forward to step two.
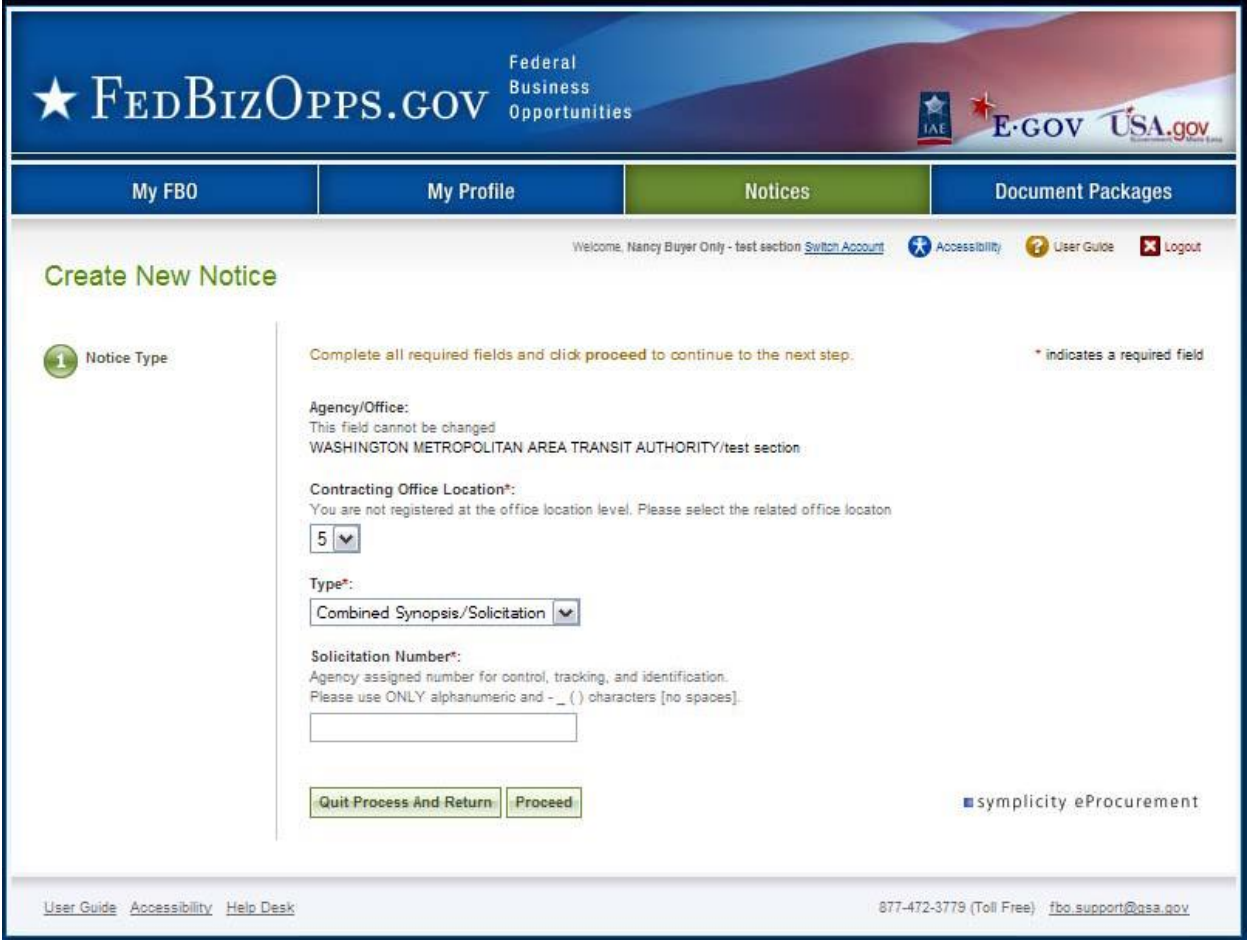
Step 2 – NOTICE Details

I.   The second step establishes the following fields for the Notice (asterisks indicates required form field):

a.   Title* - description of services, supplies, or project required. NOTE: 256 character limit.

b.   Classification Code* - Service or supply code number.

c.   NAICS Code*

d.   Is this a Recovery and Reinvestment Act Action*

e.   Response Date* (note – if time is not selected, it will default to 11:59:59 PM ET)

f.   Primary Point of Contact*

g.   Secondary Point of Contact

h.   Description*

i.   Place of Contact Performance

j.   Set Aside

k.   Archiving Policy* (note - notices archive the morning of this date).

l.   Allow Vendors to Add/Remove From Interested Vendors*

m.   Allow Vendors to View Interested Vendors List*

Note: Because of the length of the form, not all fields are shown in the manual screen shots. Buyers should enter data requested in sequence as they scroll down the form. Fields will potentially appear conditionally as data is entered (e.g., if archiving policy is set to automatic, on specified date the buyer will be asked to enter the archive date).

In addition, some browsers may not display the form fields in the same way presented in this guide. The fields are structured to allow for a broad spectrum of browsers, and will be presented in the most robust manner for a user's system configuration. Internet Explorer users should upgrade to version 6.0 or higher, and Firefox users should operate on version 2.0 or higher, for optimal capabilities.

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

II. For the Classification Code field, use the arrow key field to open a complete listing. Highlight the target code and hit enter.
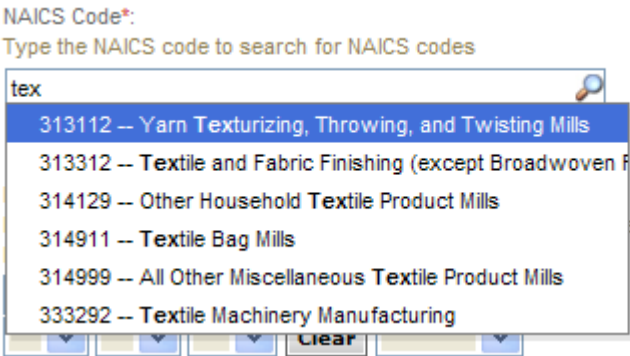
Classification Code*:
Service or supply code number. Each synopsis shall classify the contemplated contract action under the one classified code which most closely describes the acquisition. If the action is for a multiplicity of goods and/or services, the preparer should select the one category best describing the overall acquisition based upon value.

```
10 -- Weapons
11 -- Nuclear ordnance
12 -- Fire control equipment
13 -- Ammunition & explosives
14 -- Guided missiles
15 -- Aircraft & airframe structural components
16 -- Aircraft components & accessories
17 -- Aircraft launching, landing & ground handling equipment
18 -- Space vehicles
19 -- Ships, small craft, pontoons & floating docks
20 -- Ship and marine equipment
22 -- Railway equipment
23 -- Ground effects vehicles, motor vehicles, trailers & cycles
24 -- Tractors
25 -- Vehicular equipment components
26 -- Tires and tubes
28 -- Engines, turbines & components
29 -- Engine accessories
30 -- Mechanical power transmission equipment
```

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.

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

tex

313112 -- Yarn **Tex**turizing, Throwing, and Twisting Mills
313312 -- **Tex**tile and Fabric Finishing (except Broadwoven F
314129 -- Other Household **Tex**tile Product Mills
314911 -- **Tex**tile Bag Mills
314999 -- All Other Miscellaneous **Tex**tile Product Mills
333292 -- **Tex**tile Machinery Manufacturing

es. Leave empty if there

Clear

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

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

111

111110 -- Soybean Farming
111120 -- Oilseed (except Soybean) Farming
111130 -- Dry Pea and Bean Farming
111140 -- Wheat Farming
111150 -- Corn Farming
111160 -- Rice Farming
111191 -- Oilseed and Grain Combination Farming
111199 -- All Other Grain Farming
111211 -- Potato Farming
111219 -- Other Vegetable (except Potato) and Melon Fa

New Contact

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.

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

Having Problems With This Field? Click Here.

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

111110 -- Soybean Farming
111120 -- Oilseed (except Soybean) Farming
111130 -- Dry Pea and Bean Farming
111140 -- Wheat Farming
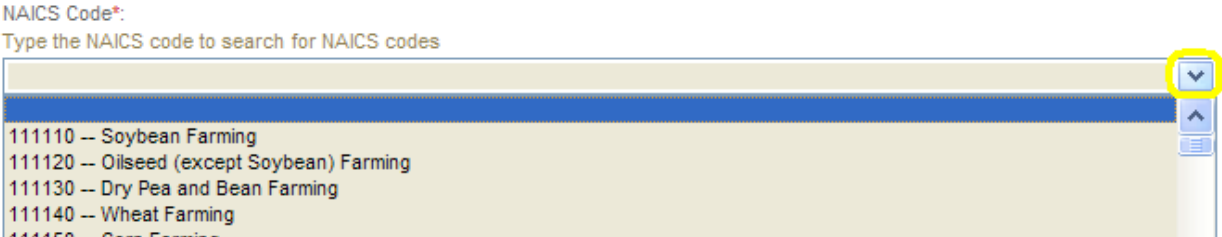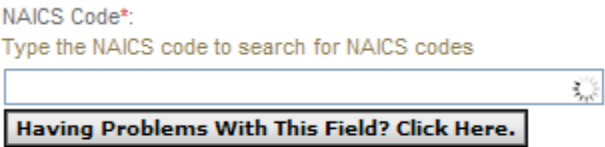
I.   When creating a notice, if you are having trouble cutting and pasting text to the description text box, click the icon with the letter T on the icon, or press the control and the v keys. Performing either action will open a pop-up window that allows you to paste in plain text to the field. Note, 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.
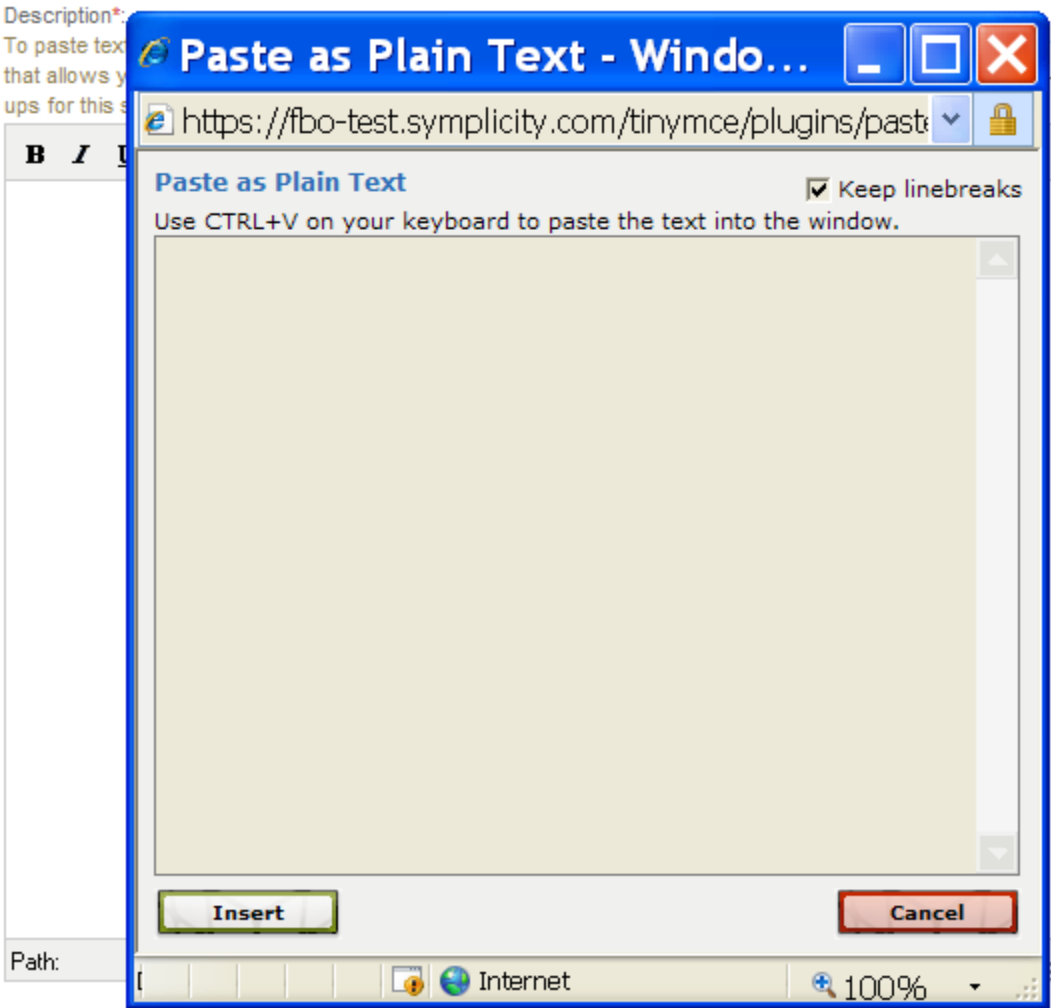
For the IVL (Interested Vendor List) fields, agency administrators can force agency solicitations to be configured a certain way on the two fields that pertain to IVL. If the IVL fields are not editable, the system is applying agency forced values for this setting. Contact you Agency Administrator for 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

[Go Back] [Save Draft] [Quit Process And Return] [Proceed]

Step 3 – Attachments

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

II. During Step 3, if you save the notice as a draft, you can edit the attachment(s) again before posting. When you upload a file during this step, it saves the document as a fixed attachment. Users cannot ever edit attached files per se. Users can delete an attached document or remove Package and upload a new one if the notice is still in draft status.

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

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

Controlled, Unclassified Attachments

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

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

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

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

II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

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, Vendorsmust 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.

[   ] [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]

[Remove Package]

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

Add New Package

Go Back   Save Draft   Quit Process And Return   Proceed

Non-Sensitive/Secure Attachments

I.   If the user is attaching a document that is not sensitive/secure, they should mark Is this package sensitive/secure? no.

II.   Next, users are prompted to enter the package type (available package type options will align with the notice type).

III.   On the file Type field, the user indicates whether or not the material to upload is either a file or a link

IV.   If upload is chosen, the user is asked to specify the filename (note, user can use browse option to find the file) and to specify if the file is compressed (in .zip format). If link is chosen, the user is asked to specify the URL.

V.   Users are required to enter a description of the package.

VI.   After the document has been added, the user can add another document to this package or add another entirely new package.

VII.   Go Back button (bottom of form) takes the user back to step two in the process (not shown in image).

VIII. Save Draft saves the materials to the draft notice (not shown in image).

IX.   Quit Process and Return does not attach the materials (not shown in image).

X.   Proceed takes the user to the next step in notice creation process (not shown in image).

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

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

3.3.2　Modify/Amend Notice

I. From any page on the system, a user can go to upper navigation Notices button and then use the modify/amend option to make edits to the notice. Look for:

II. Additionally, a user can use the quicklink Mod/Amend Notice on their My FBO page to modify / amend a notice.

I. During the modification type step in the modify/amend process, the user indicates which step they would like to start with as they move forward:
   a.   Add to or edit the description
   b.   Attach files to the notice
   c.   Note, if the Bid Module is enabled, there will be an additional option presented called Bids (CLIN/Doc Packages). See section 3.3.10 for more details.
II. The system will then present the appropriate steps to allow the user to make the requested modifications/amendments.
III. If making edits to notice details, they will be taken to notice details step.
IV. If only attaching files, the user is taken directly to attachments.

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

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

II.

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 satisifed 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.

B *I* U ≡ ≡ ≡ ≡ 📋 📄 ✅ ▾
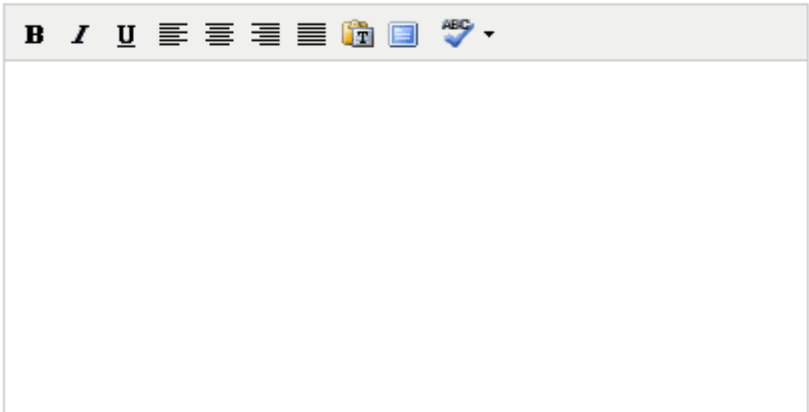
① Notice Type
② Modificaton Type
③ Notice Details
④ Attachments
⑤ Review/Submit

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.

Go Back | Save Draft | Quit Process And Return | Proceed

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

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

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

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

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

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

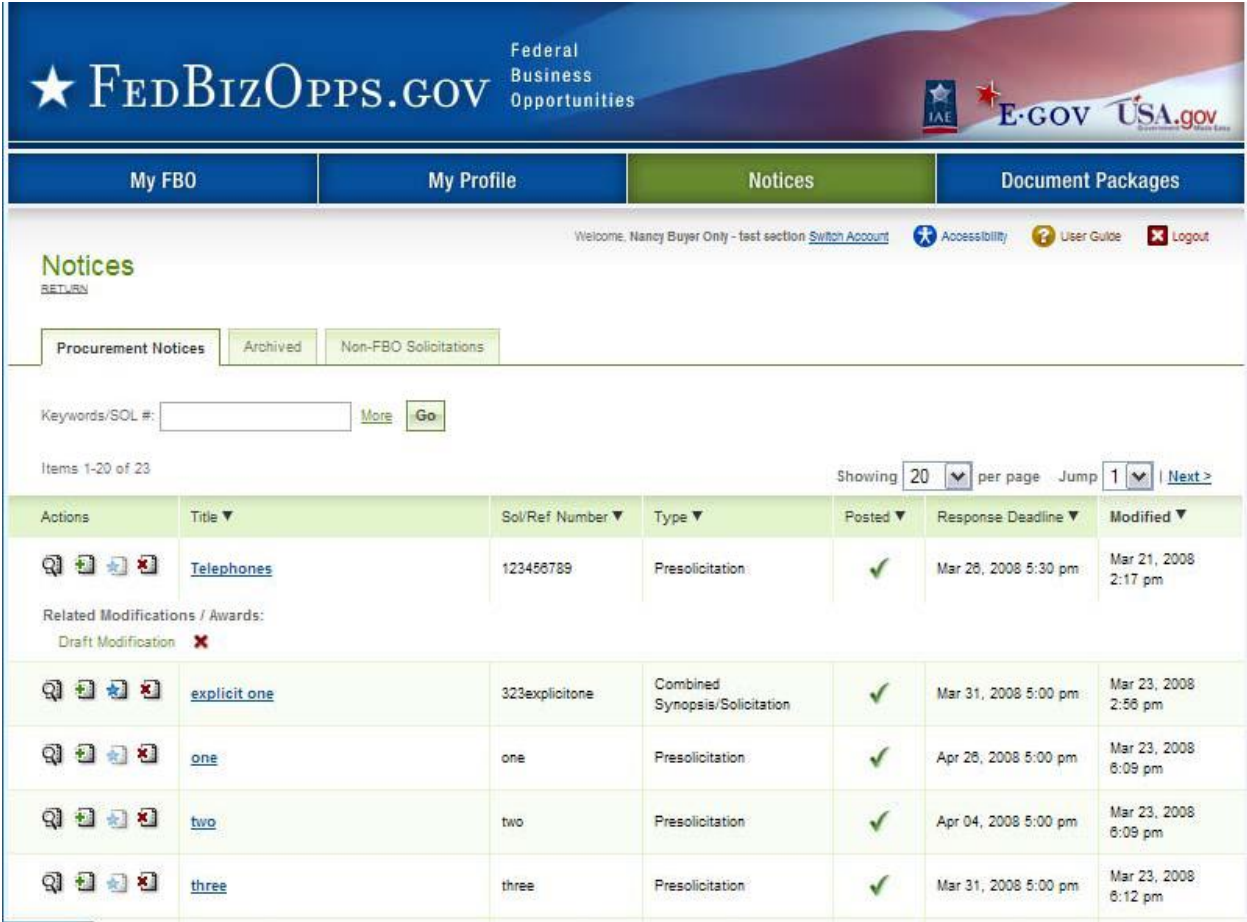I.   If attaching controlled, unclassified packages, the user is given the option to create a new package (if user has Engineer User rights) or to select an existing (enter the PR# and use the find package button.

I.   If adding new, a form will present that allows the user to set up the package. Users can either create a new package or select an existing package.

II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

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, Vendorsmust 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.

[_____] [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]

[Remove Package]

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

[Add New Package]

[Go Back] [Save Draft] [Quit Process And Return] [Proceed]

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.

I. At step two of the award notice, the user is required to enter the contract award date, contract award number, contract dollar amount, and awarded contractor name.

II. Contract Line Item Number, Contractor Awarded Address and DUNS Number are not required fields.

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

IV. At the bottom of the form, the save draft button saves the award in draft format.

V. Quit Process and Return returns the user to the list of notices

VI. Go back allows the user to go back in the stepwise process.

VII. Proceed moves the user forward in the stepwise process.

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

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

3.3.4   Cancel Notice

I.   From any page on the system, a user can go to upper navigation Notices button and then use the cancel award button to cancel the notice. Look for:

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

I.   If an award is being cancelled, the user is prompted to enter additional text that will
       be highlighted to vendors reviewing the cancelled notice.
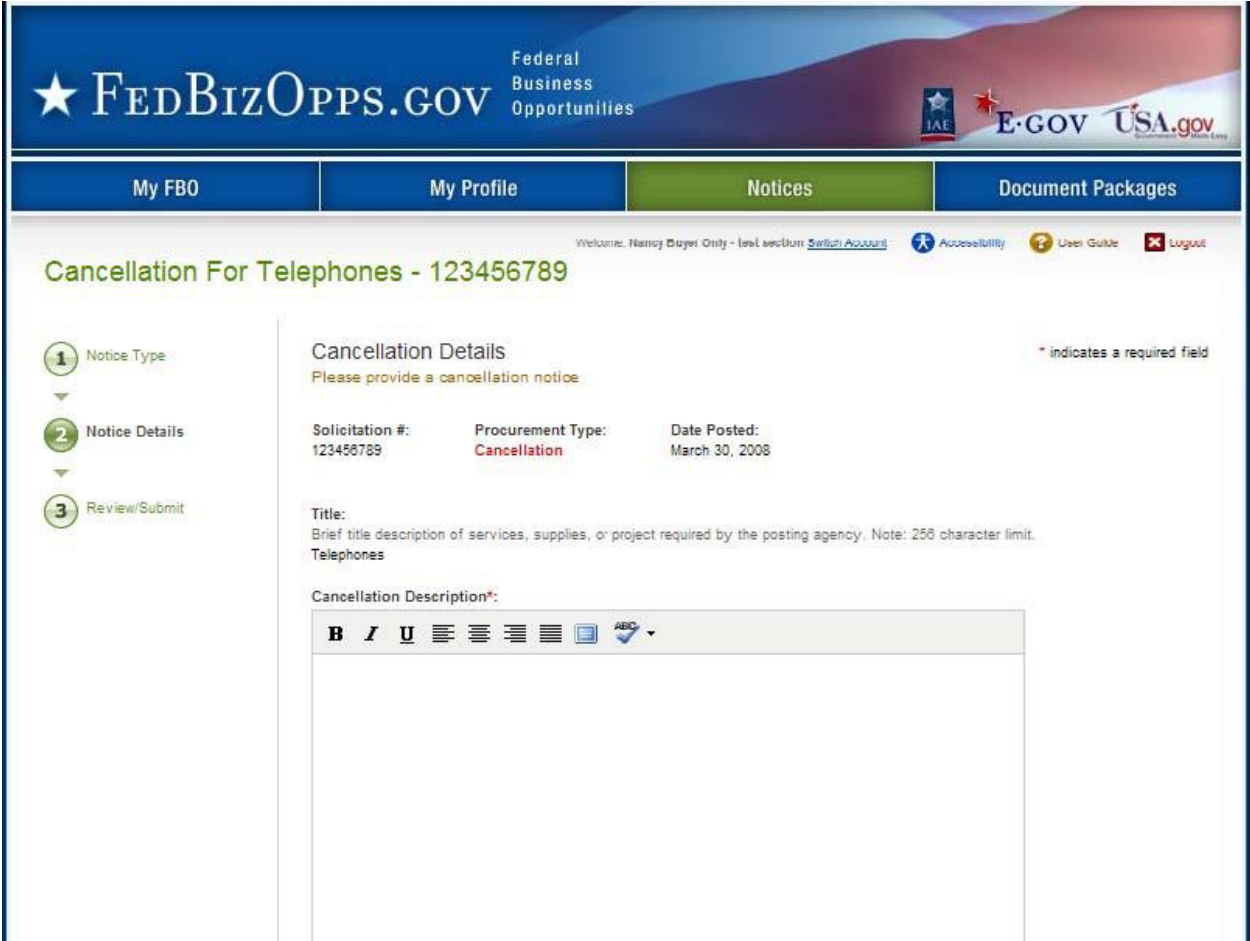
II.   At the bottom of the form, the Go Back button takes the user back to step two in the
       process
III.   Save Draft saves the materials to the draft notice.
IV.   Quit Process and Return does not attach the materials.
V.   Proceed takes the user to the next step in notice creation process.

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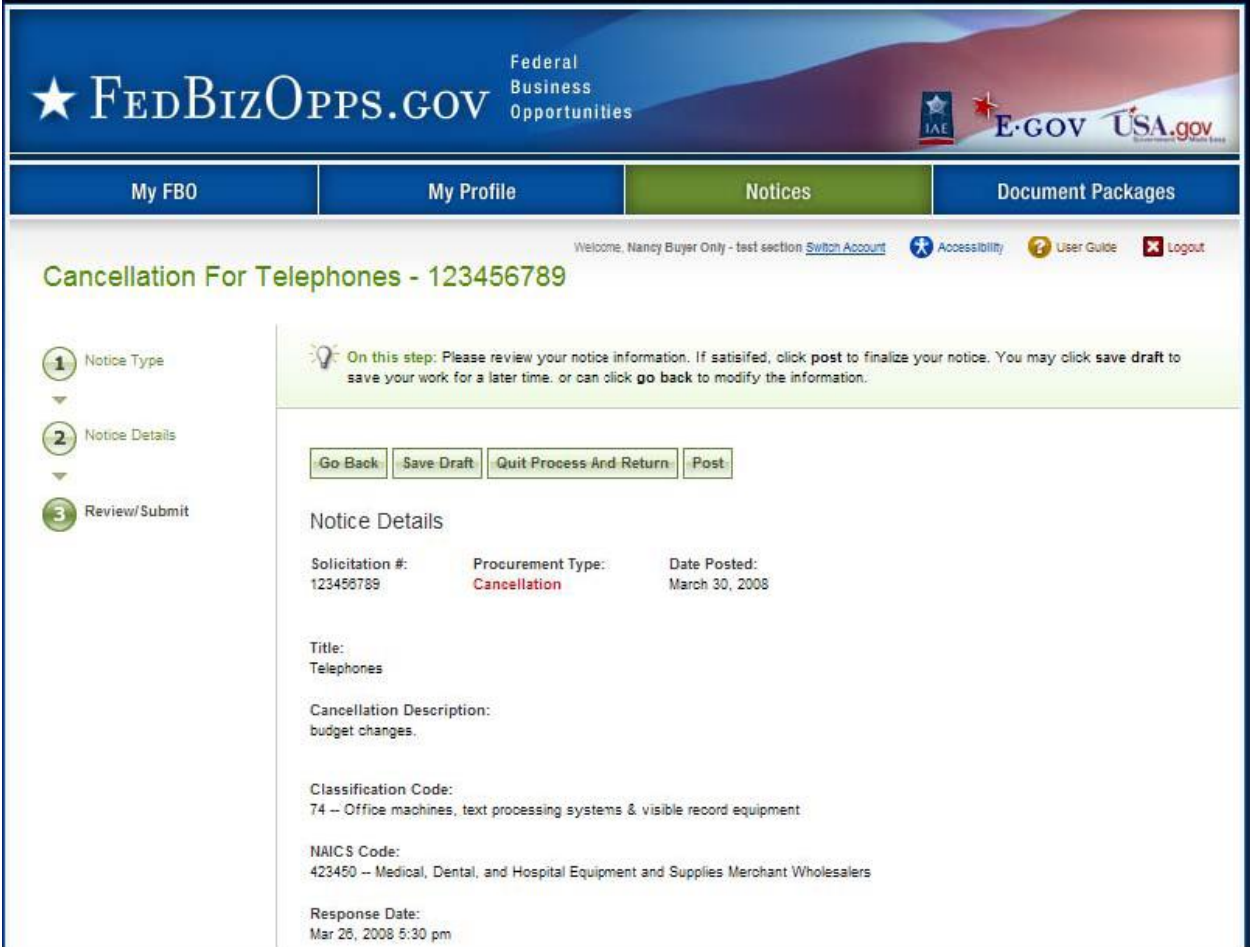
3.3.5 Deletion of Draft Notices

I. A user can review all drafts from the main procurement notices list of notices. Draft items are indicated with a red x in the posted column.

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

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

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

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 #:   Procurement Type: Date Posted:
combined123   Combined Synopsis/Solicitation   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.

I.   User will be asked to confirm the archive.
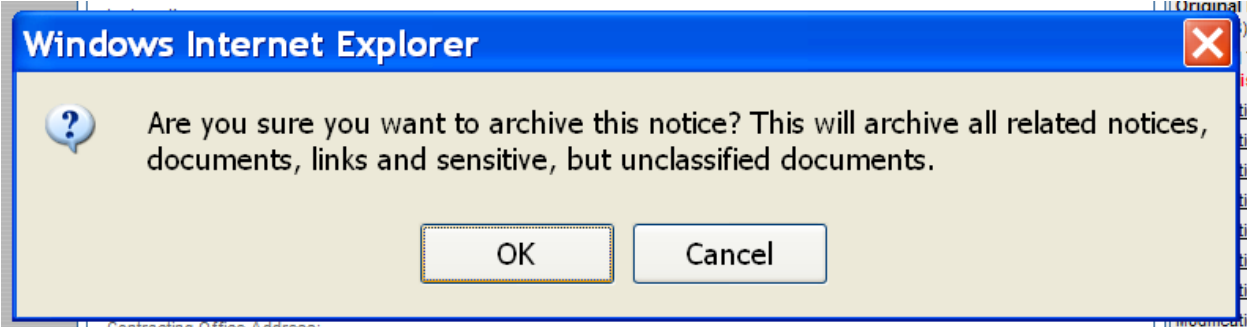
3.3.7 Unarchive Notices

I. To review all archived notices, go to upper navigation notices and the sub-tab archived.

II. To unarchive the notice, from the archived sub tab, click on the view icon for the notice.

I. Select unarchive to return the notice and associated documents to active status.

II. The system will prompt the user to confirm this operation.
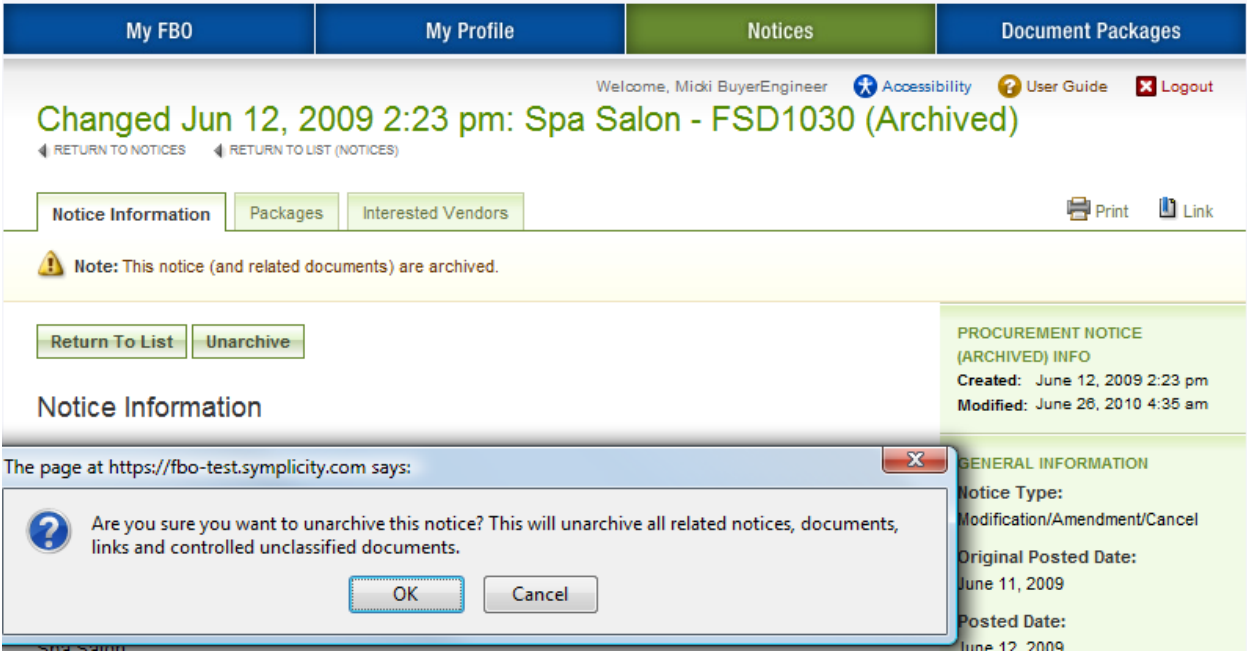
3.3.8   Print Notices

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

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

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

Print   Close

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

Notice Type:	**Original Posted Date:**
Award Notice	March 23, 2008
Posted Date:	**Original Response Date:**
March 23, 2008	Mar 31, 2008 5:00 pm
Response Date:	
-	

Archiving Policy:
Automatic, 15 days after response date

Original Archive Date:
-

Archive Date:
-

Classification Code:
A -- Research & Development

NAICS Code:
111 -- Crop Production/111130 -- Dry Pea and Bean Farming

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

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.*

II. Go to the interested vendors sub-tab.

3.4 Manage FBO Notices with Bid Module Enabled

3.4.1   Create Notice

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

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

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

III.   If Doc Package is selected, vendors will be able to submit document responses (file uploads) electronically.

IV.   The CLIN template includes the following fields:
    a. Line Item Description*: Buyer provides a brief description about the Line Item;
    b. Quantity*: Buyer enters the quantity of the Line Item;
    c. Add Line Item: Buyer clicks this button to add as many additional parent line items as needed to complete the template;
    d. Add New Child Item: Buyer can add unlimited child line items under each parent line item; the child line items will be indented when displayed.

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.

[Add New Child Item] [Deleted (Undelete)]

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

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

3.4.2   Modify / Amend Notice

  I.   From any page on the system, a user can go to upper navigation Notices button and then use the modify/amend option to make edits to the notice. Look for:

 II.   Additionally, a user can use the quicklink Mod/Amend Notice on their My FBO page to modify / amend a notice. (See section 3.3.2, page 43 for a screen shot.)
III.   During the modification type step in the modify/amend process, the user indicates at which step they want to start the modification process:
  a.   add to or edit the description (see section 3.3.2)
  b.   attach files to the notice (see section 3.3.2)
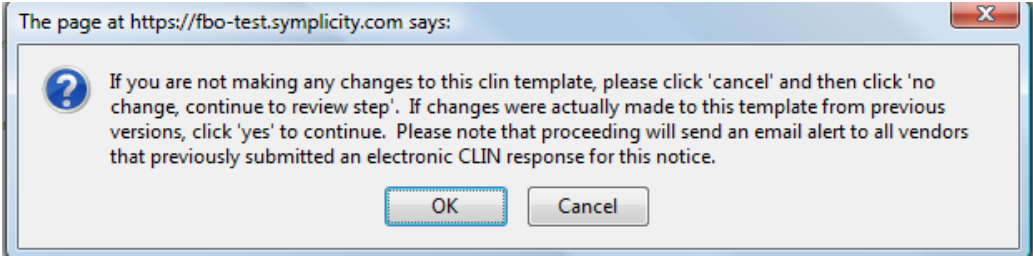 c.   bids (CLIN/Doc Packages)

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

V.   Note, if the user previously created a CLIN template, and deselects that option now, the system will recall the template if and when the user re-enables the CLIN option.

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

VI.   At the bottom of the form for step five Bids - Type, there are five options:
    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:

The page at https://fbo-test.symplicity.com says:

If you are not making any changes to this clin template, please click 'cancel' and then click 'no change, continue to review step'. If changes were actually made to this template from previous versions, click 'yes' to continue. Please note that proceeding will send an email alert to all vendors that previously submitted an electronic CLIN response for this notice.

OK   Cancel

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 | Modifiy/Amend | Archive | Print

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

Notice Information

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

ELECTRONIC SUBMISSIONS
Doc Package
CLIN

Location:

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

Bid Mod Test 39 - MM-FBO-039
◀ RETURN   ◀ RETURN TO LIST (NOTICES)

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

Keywords: [   ]   [Go]

⚠ No items found

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

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

Keywords: [   ]   [Go]

[Batch Options ▼] Items 1-2 of 2

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

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

| 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:

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
Grand Total:			**2,500.00**

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

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: Mickl Vendor
Modified: February 21, 2009 10:38 pm
By: Mickl 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: [   ]   Go

⚠ No items found

Add New Note

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

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

| Core | Notes |

Submit   Save   Return

Note Information
Body*: [   ]

Submit   Save   Return

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.
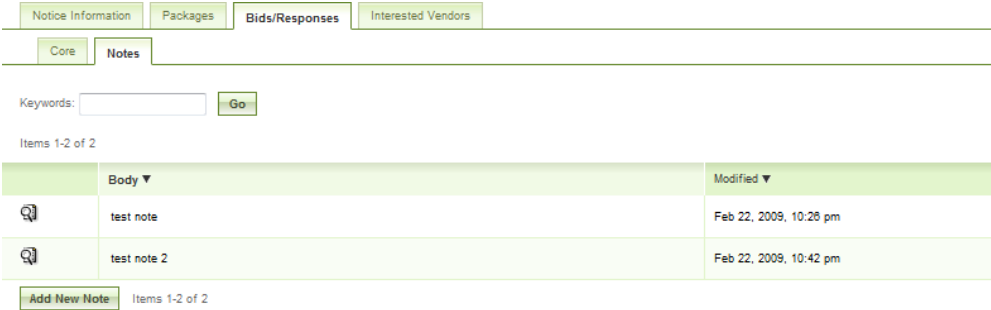
v. The user can review the Note Information and make changes (or delete the note) by clicking on the Edit button; otherwise, the user clicks Return to go back to the main list of Notes for that response.
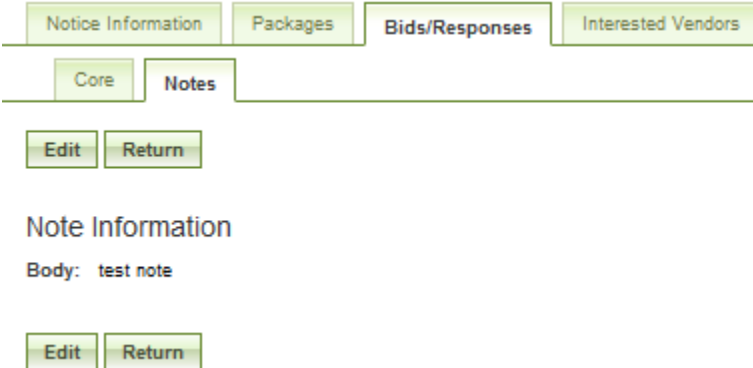
V. A user can download all or a select number of vendor responses into a Zip file by following these steps:
   a. Within the Bids/Responses tab of a particular notice, select the responses to be downloaded using the checkboxes next to each response;
   b. Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;
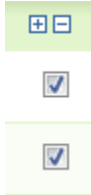
   c. Next, click on the down arrow next to Batch Options and select the Download Zip option;
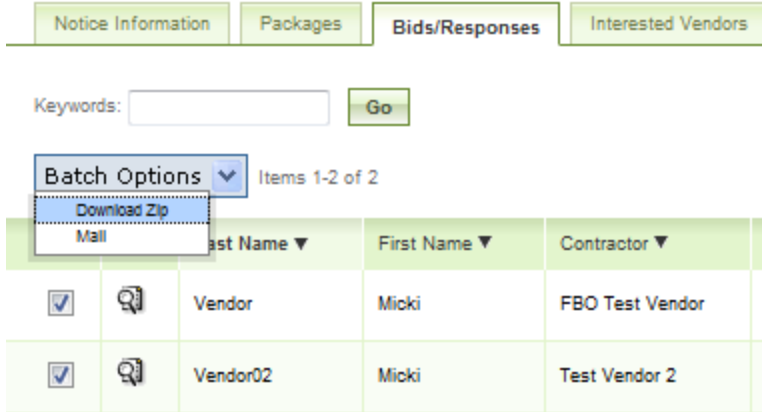
VI. Users can also send email messages to selected vendors by following these steps:
   a. Within the Bids/Responses tab of a particular notice, select the response(s) for which you would like to send an email message to the associated vendor(s) using the checkboxes next to each response;
   b. Note, 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;
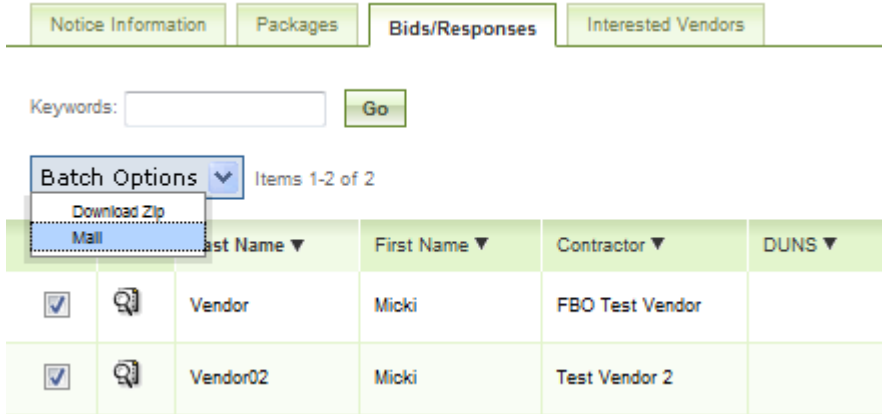
   d. The system opens Mail Wizard sub-tab which provides instructions for creating an email message to the vendors selected in the previous step:
      i. Enter the Subject of the email message;
      ii. The system will automatically enter in the email addresses on file for the vendor response(s) selected 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.
m▇▇▇▇n@s▇▇▇▇y.com

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. he user can attach more files using the Add Additional Attachments button;

vii. Cancel does not save the message and returns the user to the main Bids/Responses tab;

viii. Next moves the user to step two, Review Recipients where the system will allow the user to review the list of recipients, and make any necessary changes

ix. Cancel does not save the message and returns the user to the main Bids/Responses tab;

x. <prev returns the user to step one, Review/Edit Message;

xi. Send Messages begins the mailing process. **Note, this action cannot be reversed.**

3.4.4 Create Award

I. From any page on the system, a user can go to upper navigation Notices button and then use the create award button to add an award to the notice. Look for:

 (see section 3.3.3 page 54 for screen shot).

II. Additionally, a user can use the quicklink create award on their My FBO page to modify / amend a notice.

III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.

IV. If the Bid Module is enabled for a user's notice and there are vendor electronic responses submitted, the user can also initiate the award process directly from the

Core sub-tab of an electronic response by clicking on the Create Award Notice button. (Note, this button will only be present if the notice is eligible for award.)
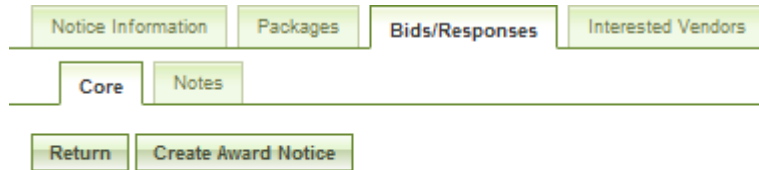
V.   After clicking Create Award Notice, the system will take the user to step two of the award process, Notice Details, where the following fields are pre-populated:
   a. Title;
   b. Classification Code and NAICS Code;
   c. Contract Award Date;
   d. Contractor Awarded Name and Address;
   e. Primary and Secondary Point of Contact Information;
   f. Existing Description.
VI. See section 3.3.3 for detailed information on the steps required to continue processing an award.

3.4.5   Cancel Notice

See section 3.3.4.

3.4.6   Deletion of Draft Notices

See section 3.3.5.

3.4.7   Archive Notices

See section 3.3.6.

3.4.8   Unarchive Notices

See section 3.3.7.

3.4.9   Print Notices

See section 3.3.8.

3.4.10   Review Interested Vendors List

See section 3.3.9.

3.5 Non-FBO Secure Document Link

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

3.5.1   Create Non-FBO Secure Document Link

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

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

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

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

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

3.5.2 Un-release Non-FBO Secure Document Link

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

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

III. To unrelease a previously released Non-FBO document, go to Notices and the Non-FBO Solicitations sub-tab. Click on the review tab to open the previously released item.

I.   From the Details tab, use the unreleased solicitation button to unreleased the Non-FBO solicitation. When prompted, the user will need to confirm intended operation.
II. If there is not an intention to re-release the solicitation, use archive to send the solicitation to archives. When prompted, the user will need to confirm intended operation.
III. Return returns the user to the list of Non-FBO Solicitations

3.5.3   Delete Draft Non-FBO Secure Document Link

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

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

I. Within the Non-FBO notice use the proceed option to move forward to the review/submit step

II. When on the Review/Submit step, if the user selects delete, (appears at the bottom of the form), they will be asked to confirm that they indeed want to delete the item. This is important to consider, as deleted drafts do not go to archives and because the process of deletion cannot be undone.
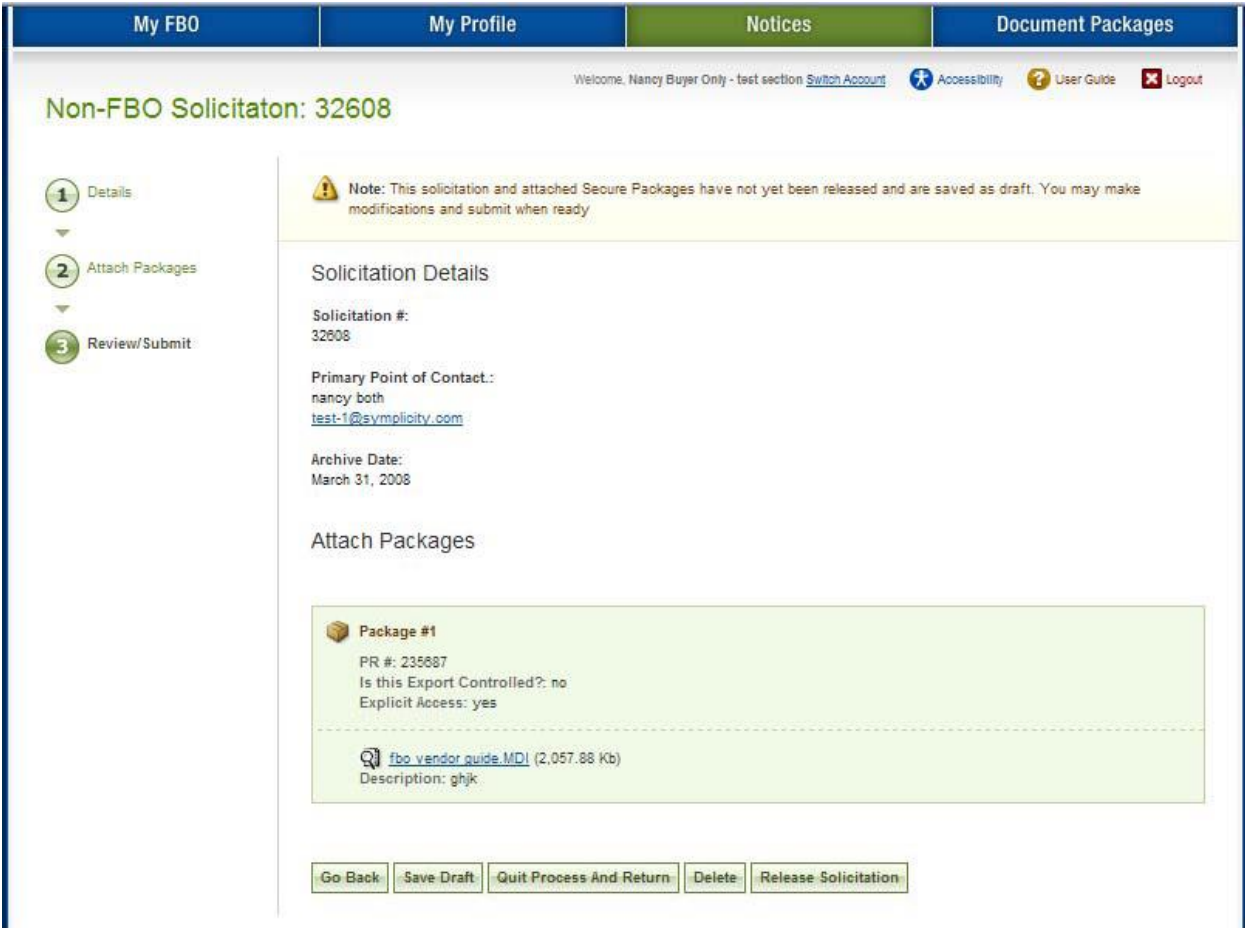
3.6 Manage Document Packages
(outside context of FBO Notice Creation)

3.6.1   Add New Document Package to Existing Notice

I.   From the Document / Links main navigation, users can create, and assign new documents to released solicitations.
II.   Use the add new button.
III.   Additionally, a user can use the quicklink upload new docs/links on their My FBO page to add a new package.
IV.   Note, if you create a new document using this resource, and save the materials as drafts, the resources will remain as drafts in the system until they are posted or deleted.
V.   Buyers that are buyer only – versus both buyer and engineer will only be able to create non-secured packages through this process.
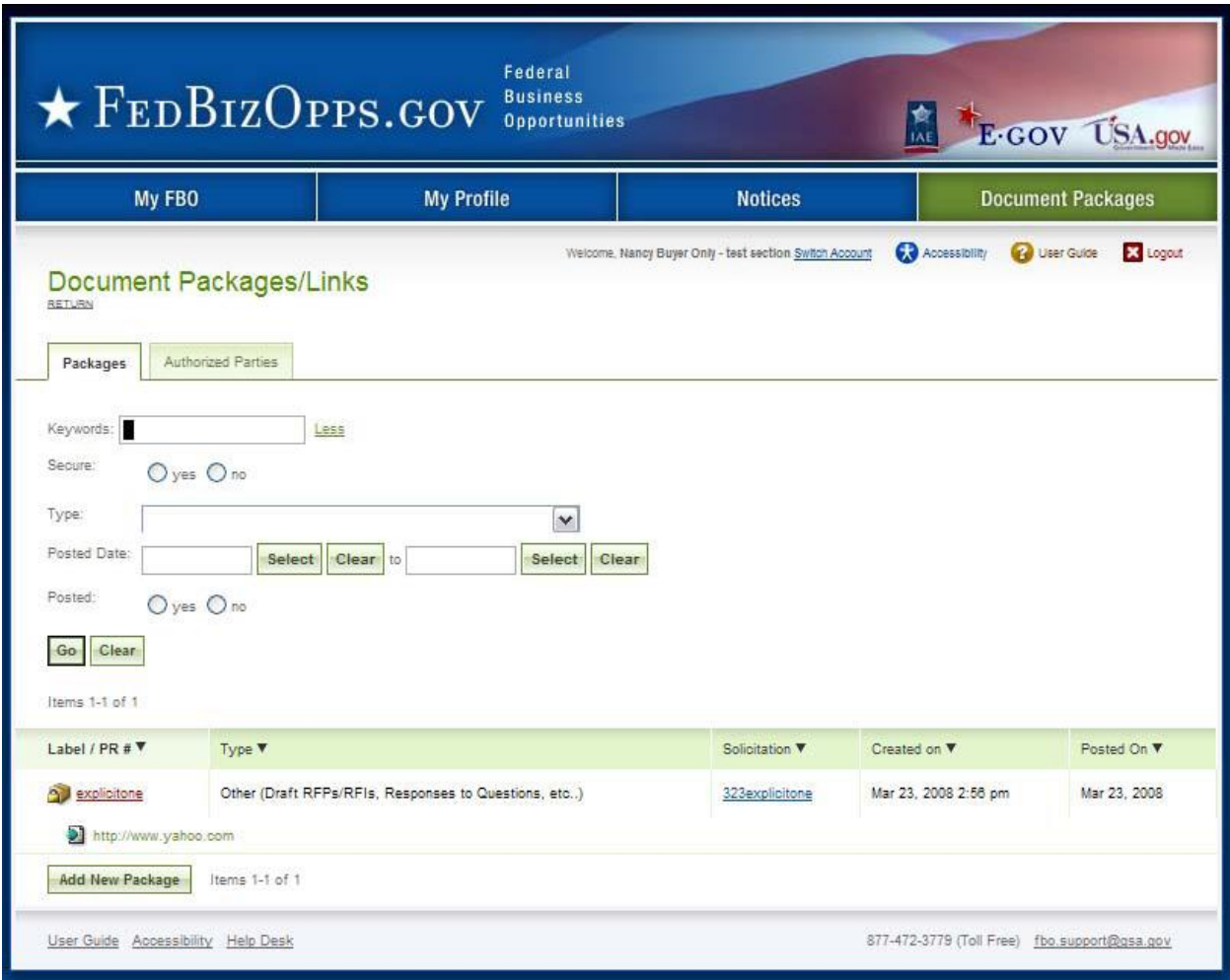
I.   At step one, Details, the user indicates whether the document is sensitive/secure and if tied to a FBO solicitation, and then completes the other elements of the document package creation process (fields will appear conditionally based on user responses).
II.   At the bottom of the form, Save Draft saves the materials to the draft notice; Quit Process and Return returns the user to the list of document packages and; Proceed moves the user forward in the stepwise process.
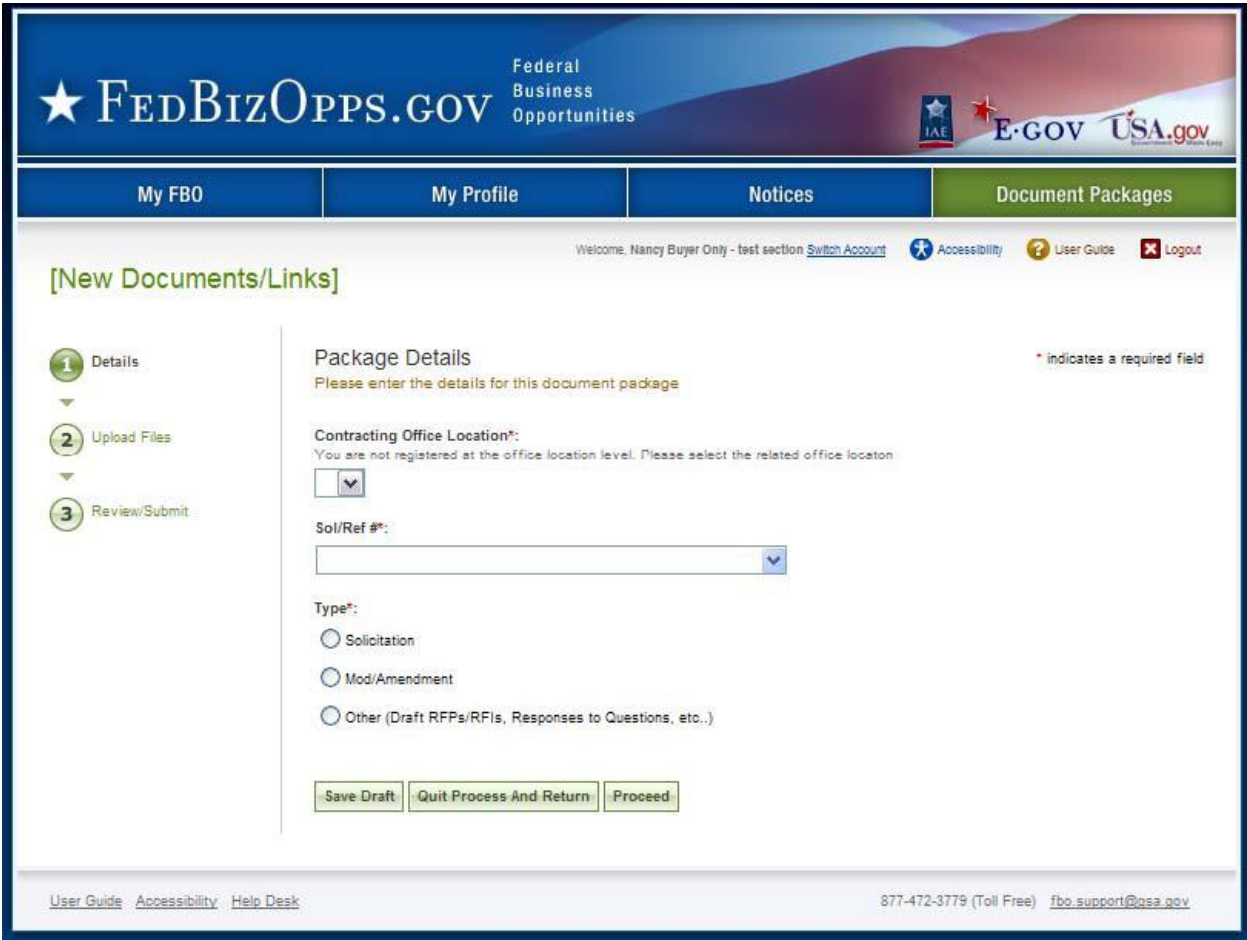
I. At step two, the user uploads files.
II. A description is required.
III. Bottom of page, Go back allows the user to go back in the stepwise process.
IV. Save Draft saves the materials to the draft notice.
V. Cancel returns the user to the previous navigation.
VI. Proceed & Review moves the user forward in the stepwise process.
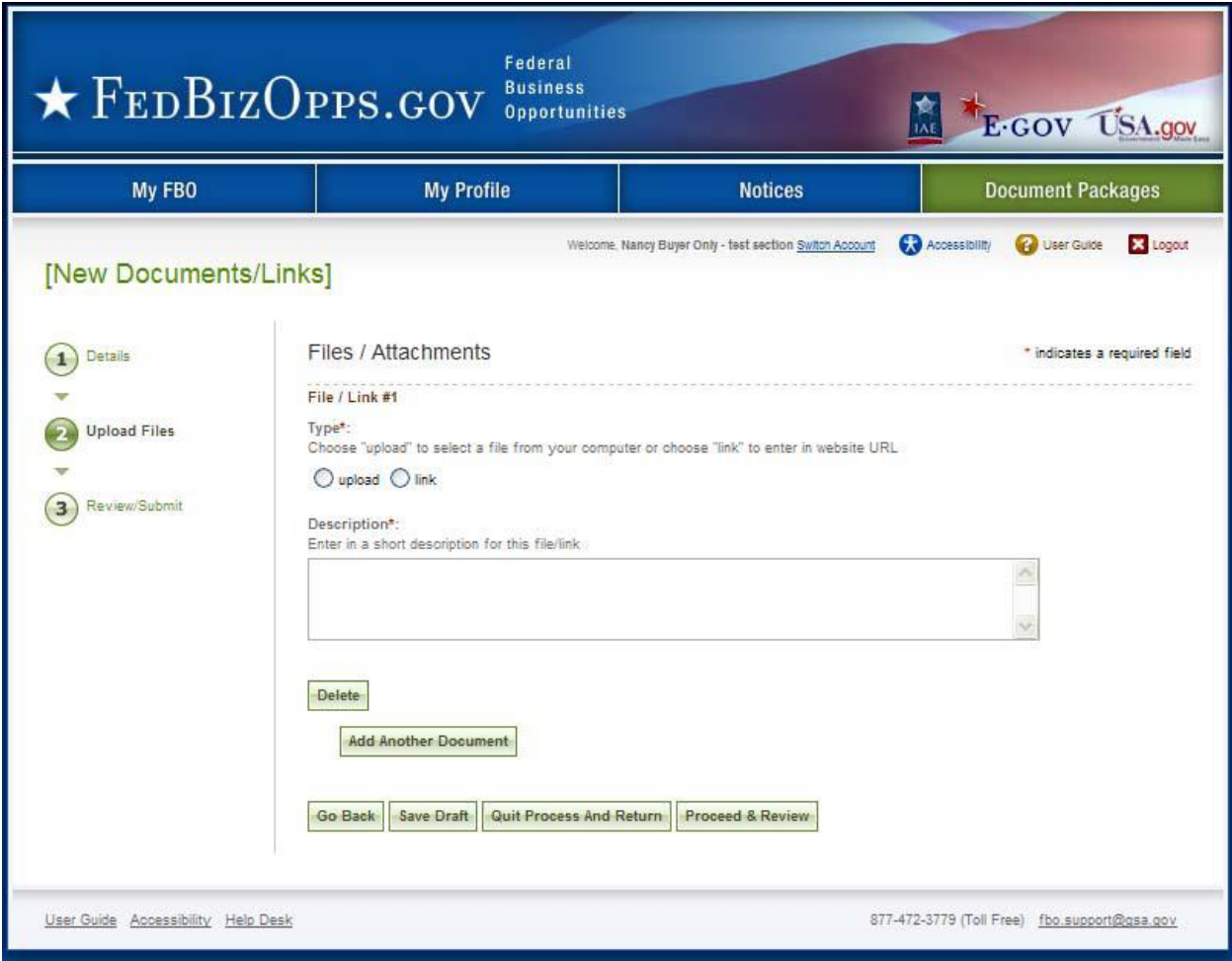
I.   At step three, review/submit, the user is able to review materials, and if appropriate to use post documents.

II.   Go back allows the user to go back in the stepwise process.

III.   Save Draft saves the materials to the draft notice.

IV.   Cancel returns the user to the previous navigation.

V.   Release Package adds the documents for use in the system.

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 Back] [Save Draft] [Quit Process And Return] [Release 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.

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.

Windows Internet Explorer

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

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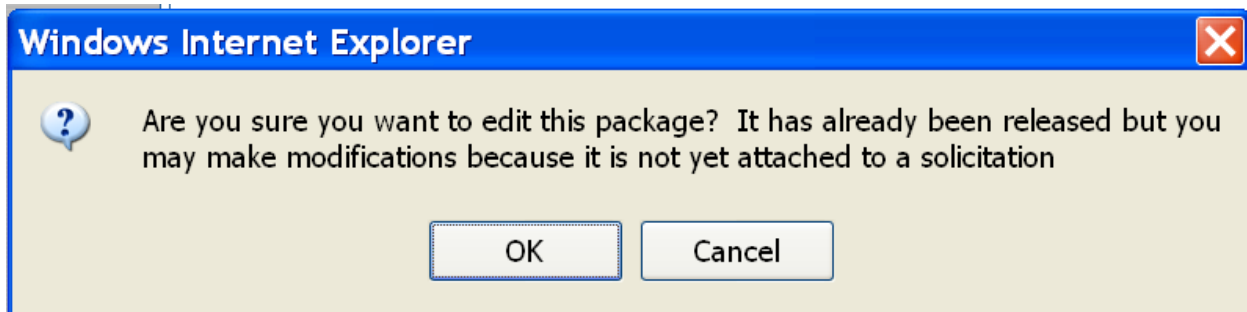
II.   Users will be taken to step one of document creation and can progress as if the document had been previously saved as draft. See above for details on notice creation.

3.6.3   Delete Document Package

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

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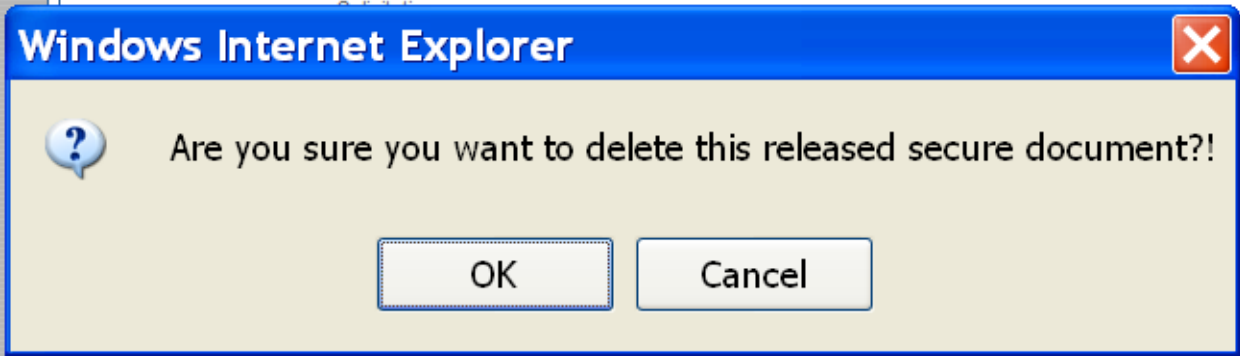
3.6.4   Manage Explicit Access Requests

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

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

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

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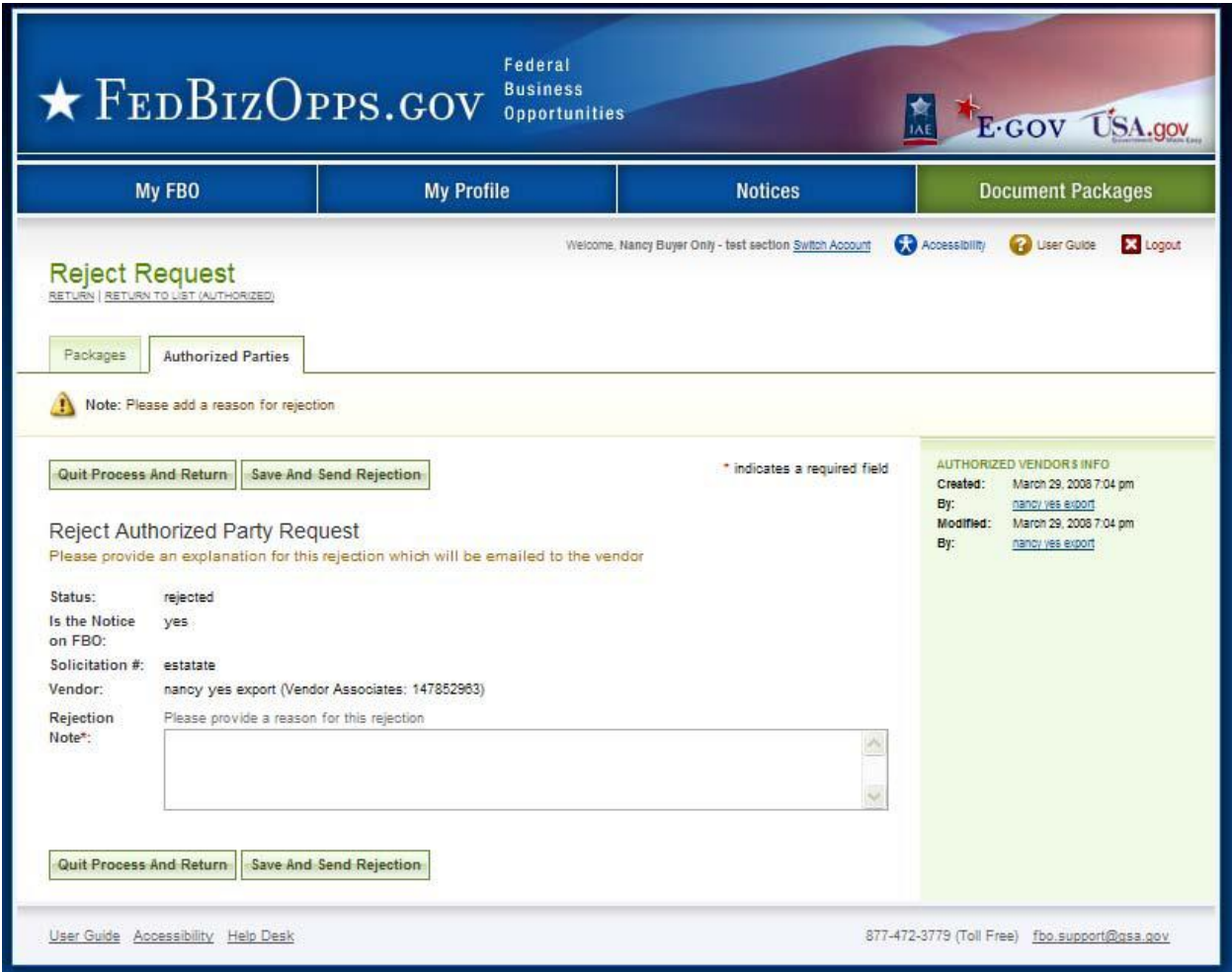
3.6.5 Review Authorized / Rejected Explicit Access Requests

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

3.6.6 Document Audit Trail

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

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

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

II. Return closes the record.