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1 System Overview

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

All Users: From the site’s main navigation page, any user (not password protected) can utilize navigation to review:
- Getting Started
- General Information
- Opportunities
- Agencies / Offices Lists
- Privacy Statement

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

Vendors, when logged in using their password protected account can do the following:
• **Vendor Profile:** Vendors maintain profiles in the system streamlining use of the portal. Among other profile elements, the following key vendor information is maintained in their profile:
  - **DUNS (Data Universal Numbering System) Number**
  - **Commercial and Government Entity (CAGE) Code**
  - **MPIN (Marketing Partner Identification Number)** – Optional profile field required to view controlled, unclassified materials.

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

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

• **Opportunity Actions:** Vendors are able to add themselves to the Interested Vendors List (IVL) for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity by logging into the system and clicking on the IVL tab for the specific solicitation. Vendors can request explicit access to view controlled, unclassified materials with explicit access designation. If the vendor’s profile indicates that the vendor is eligible for access to export controlled packages, the system allows the vendor access to those packages. Additionally, Vendors can electronically respond to RFIs, RFQs, and RFPs directly through the web site for those notices which have the Bid Module enabled by the buyer.
### 1.1 Definition of key terms

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

<table>
<thead>
<tr>
<th>Term</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility</td>
<td><img src="Accessibility.png" alt="Accessibility Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td>Account</td>
<td>n/a</td>
<td>From an account, a user is designated as an engineer for a particular agency or office. Because some engineers are associated with multiple agencies/offices, they will have multiple accounts tied to their username.</td>
</tr>
<tr>
<td>Add Office Location</td>
<td><img src="AddOfficeLocation.png" alt="Add Office Location Icon" /></td>
<td>Allows admin to insert office location for Agency.</td>
</tr>
<tr>
<td>Active Notice</td>
<td>n/a</td>
<td>Notice that is open for vendor review/response.</td>
</tr>
<tr>
<td>Approve</td>
<td><img src="Approve.png" alt="Approve Icon" /></td>
<td>The Approve button is used to approve a vendor’s request for explicit access to controlled, unclassified documents.</td>
</tr>
<tr>
<td>Audit Trail</td>
<td>n/a</td>
<td>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.</td>
</tr>
<tr>
<td>Authorized Party</td>
<td>n/a</td>
<td>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.</td>
</tr>
<tr>
<td>Authorized Vendor</td>
<td>n/a</td>
<td>Export Controlled 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.</td>
</tr>
<tr>
<td>Bids</td>
<td>n/a</td>
<td>If enabled by the admin and buyer, this feature allows for the electronic submission and evaluation of vendor responses to notices.</td>
</tr>
<tr>
<td>Buyer</td>
<td>n/a</td>
<td>Government user that is presenting an opportunity notice in the system.</td>
</tr>
<tr>
<td>CAGE Code</td>
<td>n/a</td>
<td>Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Cancel Notice</th>
<th>Notice that has been cancelled. Does not go to archives until archive date for the notice.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear</td>
<td>The Clear button appears when a user is using search filters. If selected, the system clears any previously entered search filters.</td>
</tr>
<tr>
<td>CLIN</td>
<td>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.</td>
</tr>
<tr>
<td>Create Award Document</td>
<td>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.</td>
</tr>
<tr>
<td>Document</td>
<td>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.</td>
</tr>
<tr>
<td>Doc Package</td>
<td>If enabled by the buyer, vendors can submit an electronic response to notices in the form of document (file) uploads.</td>
</tr>
<tr>
<td>Draft</td>
<td>Saved, but not necessarily complete. Drafts are not viewable on vendor interface.</td>
</tr>
<tr>
<td>DUNS</td>
<td>DUNS (Data Universal Number 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 &amp; Bradstreet, Inc. (D&amp;B) to identify unique business entities.</td>
</tr>
<tr>
<td>Edit</td>
<td>Open record for edits.</td>
</tr>
<tr>
<td>Electronic Submissions</td>
<td>If the Bid Module is enabled by the Admin and Buyer, vendors can submit electronic responses to notices called Electronic Submissions which can be a CLIN form and/or a doc package.</td>
</tr>
</tbody>
</table>
| Engineer      | User that can post / update sensitive, but unclassified documents for use as attachments to Opportunities. Engineers are registered for a
<table>
<thead>
<tr>
<th>Term</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explicit Access</td>
<td>n/a</td>
<td>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.</td>
</tr>
<tr>
<td>Export Controlled</td>
<td>n/a</td>
<td>Export Controlled 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.</td>
</tr>
<tr>
<td>Form</td>
<td>n/a</td>
<td>Any screen where a user enters data that is saved in the system.</td>
</tr>
<tr>
<td>Go</td>
<td><img src="image" alt="Go" /></td>
<td>If data is entered in keyword search filter, select the Go button to submit the request.</td>
</tr>
<tr>
<td>Go Back</td>
<td><img src="image" alt="Go Back" /></td>
<td>During a stepwise process, use of the go back button takes the user back one step in the process.</td>
</tr>
<tr>
<td>Help</td>
<td><img src="image" alt="Help" /></td>
<td>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.</td>
</tr>
<tr>
<td>Insert Child Agency</td>
<td><img src="image" alt="Insert Child Agency" /></td>
<td>Allows admin to insert sub-agency in an Agency hierarchy.</td>
</tr>
<tr>
<td>Interested Vendor</td>
<td>n/a</td>
<td>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).</td>
</tr>
<tr>
<td>Log-in</td>
<td><img src="image" alt="Log-in" /></td>
<td>Use username and password to logon to an account on the system.</td>
</tr>
<tr>
<td>Logout</td>
<td><img src="image" alt="Logout" /></td>
<td>The Logout button can be used to log the user off the system.</td>
</tr>
<tr>
<td>Modify/Amend</td>
<td><img src="image" alt="Modify/Amend" /></td>
<td>Edit or amend a notice.</td>
</tr>
<tr>
<td>MPIN</td>
<td>n/a</td>
<td>Marketing Partner Identification Number. Export Controlled 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.</td>
</tr>
<tr>
<td><strong>Non-FBO Solicitation</strong></td>
<td>n/a</td>
<td>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.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>Package</strong></td>
<td><img src="image" alt="Package" /></td>
<td>Collection of documents that can be attached to a notice.</td>
</tr>
<tr>
<td><strong>Paste Text</strong></td>
<td><img src="image" alt="Paste Text" /></td>
<td></td>
</tr>
<tr>
<td><strong>Post</strong></td>
<td><img src="image" alt="Post" /></td>
<td>Finalizes a Notice and posts the notice on the system for vendor review.</td>
</tr>
<tr>
<td><strong>Proceed</strong></td>
<td><img src="image" alt="Proceed" /></td>
<td>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).</td>
</tr>
<tr>
<td><strong>Quicklink</strong></td>
<td>n/a</td>
<td>A quicklink is a system navigational option that if selected takes a user to a specific action on the site.</td>
</tr>
<tr>
<td><strong>Quit Process and Return</strong></td>
<td><img src="image" alt="Quit Process And Return" /></td>
<td>The quit process and return button returns the user to the previous page, without updating any record fields.</td>
</tr>
<tr>
<td><strong>Register</strong></td>
<td><img src="image" alt="Register Flow" /></td>
<td>Request a user account on the system.</td>
</tr>
<tr>
<td><strong>Reject</strong></td>
<td><img src="image" alt="Reject" /></td>
<td>The Reject button is used to reject a vendor’s request for explicit access to controlled, unclassified documents.</td>
</tr>
<tr>
<td><strong>Release Package</strong></td>
<td><img src="image" alt="Release Package" /></td>
<td>Finalizes a Package and releases for use by a buyer.</td>
</tr>
<tr>
<td><strong>Required Field</strong></td>
<td>*</td>
<td>A red asterisk next to a field label indicates that the field is a required.</td>
</tr>
<tr>
<td><strong>Return</strong></td>
<td><img src="image" alt="Return" /></td>
<td>The return button returns the user to the navigation.</td>
</tr>
<tr>
<td><strong>Review or view</strong></td>
<td><img src="image" alt="Review" /></td>
<td>Review opens an object for review.</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td><img src="image" alt="Save" /></td>
<td>The Save button saves the entered data on the form. User will be required to complete all required fields on the form.</td>
</tr>
<tr>
<td><strong>Save Draft</strong></td>
<td><img src="image" alt="Save Draft" /></td>
<td>The Save Draft button saves the entered data in a draft document, (user is not required to complete required fields on the form).</td>
</tr>
<tr>
<td><strong>Search Agent</strong></td>
<td>n/a</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Controlled, n/a</strong></td>
<td>Vendors are required to logon to the system and to</td>
<td></td>
</tr>
</tbody>
</table>
Unclassified Document | 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 | These are sections of a main navigation that a user can move to while in that main navigation (e.g., my profile is a main navigation, and account and contact information are sub-tabs in that main navigation).
---|---
Username | All users will have one username. The username is used to log into the system.
---|---
Vendor | Provider of services.
---|---
Watched List | Designation that vendor can set on a notice that saves the notice on a sub-tab list of notices. The watched list is easily accessed with a quick link.
2 Logging onto the System

2.1 System URL

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

2.2 Navigation Bar on Logon Page – Unsecured features

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

I. General Information
II. News
III. Opportunities (for all agency office locations)
IV. Agencies
V. Privacy
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 FBO.gov and click on the Register Now link in the Location / Agency Administrators section. This will open up a series of screens where the user enters registration data.
Step one – Personal Information is entered. Once required fields are entered, select proceed.
I. Step two – Account Information is entered – Agency or Agency/Office Location is set up, along with password creation. When you enter a desired password, for security purposes, the password must meet the following criteria:
   - Must be between 8 and 14 characters
   - Must contain 1 of each of the following:
     - lower case letter
     - upper case letter
     - number
     - special character (e.g. !, %, ^)

II. During account registration, location admins should request to be an office location administrator. This allows users to manage buyers and engineer registrations for their location, and to manage opportunities for their location.

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

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.
FedBizOpps (FBO) Registration Form for Federal Users

Your Full Name:
TEST LA

Your Email Address:
testla@noemail.com

Phone:
555551212

Account Information

Agency:
GENERAL SERVICES ADMINISTRATION/Office of Integrated Acquisition Environment

User Level:
Office Location Administrator

Contracting Office Location:
Sympathy Test Location

Username:
TESTLA

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

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

[Go Back] [Cancel] [Submit]
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 location admin has completed the steps outlined in the email, the registrant’s account must now wait for agency administrator approval prior to being able to logon to the system.

III. Once approved, newly registered location admins will be sent a confirmation e-mail. Once that approval is received, a new user may login to the system.
2.4 Returning Users – Log into the system

I. Point your browser to https://www.FBO.gov and select Location Administrator Login Here. **Note: a location admin's username and password will also work for the buyers/engineers interface logon.** If logged in this manner, only buyer/engineer navigation will be available. Use the location/agency admin logon to manage agency/buyer data.
II. That link takes the user to the Administrator interface for the system.
III. On this screen, enter username and password to log into the system.
IV. Click Go to continue to logon.
V. The Forgot My Password option allows a user to request a password via email (user name must be known).
VI. To return to FBO home page (previous screen), click the FBO Home page link.
VII. For Help: Federal Service Desk links directs the user to www.fsd.gov for assistance with the site.
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.

CONTROLLDED UNCLASSIFIED INFORMATION PROPERTY OF THE UNITED STATES GOVERNMENT

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

Please dispose of controlled unclassified information when no longer needed.

I. Usage Agreement

This is a Federal computer system and is the property of the United States Government. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy in anything viewed, created, downloaded, or stored on this system, including e-mail, internet, and Intranet use. Any or all uses of this system (including all peripheral devices and output media) and all files on this system may be intercepted, monitored, read, captured, recorded, disclosed, copied, audited, and/or inspected by authorized Federal Business Opportunities (FBO) personnel, the Office of Inspector General (OIG), and/or other law enforcement personnel, as well as authorized officials of other agencies. Access or use of this computer by any person, whether authorized or unauthorized, constitutes consent to such interception, monitoring, reading, capturing, recording, disclosure, copying, auditing, and/or inspection at the discretion of authorized FBO personnel, law
3 Location Admin’s Secured Interface

3.1 session time out

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

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

3.2 Main Navigation

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

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

I. Quicklinks – Navigational options that if selected take a user to a specific action on the site (e.g., Create Notice).

II. Announcements – System Announcements posted for the user’s reference.

III. Pending Actions – Tally of the pending actions, (e.g., number of explicit access requests in need of processing).

IV. Statistics – Tally of the Active and Archived Notices on the site.
3.2.2 Multi-account Users

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

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

IV. When a user logs in, they will see user name/agency of the account they are currently managing.
I. If switch account link is clicked, the user will have the option to select another account.

**Home Page Option to switch account:**

![Home Page Option to switch account](image)

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

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

![Warning message](image)

Are you sure you want to switch to a different account? You will be redirected to FBO Admin Home. If you have any unsaved work, please click cancel and first save your progress!
3.2.3 Procurement Notices

I. There are four sub-tabs on the Procurement Notices page. Procurement Notices lists all Posted (viewable on vendor interface) notices.

II. The drafts sub-tab lists draft notices (not viewable on vendor interface).

III. The archived sub-tab presents a list of archived notices (not viewable on vendor interface).

IV. The Non-FBO Solicitations sub-tab lists links to documents posted in FBO for viewing outside the context of FBO notices. Note: These links were previously managed through FedTeDS.
3.2.4 Document / Links

I. There are three sub-tabs on the user’s Documents/Links page. The packages sub-tab presents the list of active document packages associated with their registered agency/office and the archived sub-tab presents list of archived packages not viewable to vendors/public.

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

III. The keywords search allows a user to conduct a full word search of the document title.

IV. The more search fields link opens up additional search filters (less search fields closes the added search filters).
3.2.5 Manage Location

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

I. Stats is a resource tool that allows the user to view FBO system activity for an organization.

II. Data can be pulled for a particular day or for a range of days. When using range, queries are limited to 31 days for system performance reasons.

III. If range is selected, each day’s data will be presented separately in the results. Use the report type field to select single date or date range.

IV. Users can review stats for their agency level and below in the hierarchy.

V. Select Search to submit the stats request.
I. Stats Report Categories:

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

II. Totals are presented for each report category.

<table>
<thead>
<tr>
<th></th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyers</td>
<td>9</td>
</tr>
<tr>
<td>Engineers</td>
<td>9</td>
</tr>
<tr>
<td>Vendors (On Watchlist)</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>18</td>
</tr>
<tr>
<td>Active Postings</td>
<td></td>
</tr>
<tr>
<td>Presol</td>
<td>0</td>
</tr>
<tr>
<td>Mods</td>
<td>0</td>
</tr>
<tr>
<td>Awards</td>
<td>0</td>
</tr>
<tr>
<td>Sources Sought</td>
<td>0</td>
</tr>
<tr>
<td>Foreign Standard</td>
<td>0</td>
</tr>
<tr>
<td>Sale Surplus</td>
<td>0</td>
</tr>
<tr>
<td>Special Notice</td>
<td>0</td>
</tr>
<tr>
<td>Combined Synopsis/Solicitation</td>
<td>0</td>
</tr>
<tr>
<td>J&amp;A</td>
<td>0</td>
</tr>
<tr>
<td>Intent To Bundle Requirements</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>0</td>
</tr>
<tr>
<td>Active Packages</td>
<td></td>
</tr>
<tr>
<td>Non-Secure Packages</td>
<td>0</td>
</tr>
<tr>
<td>Secure Packages</td>
<td>121</td>
</tr>
<tr>
<td>Total</td>
<td>121</td>
</tr>
</tbody>
</table>
3.2.7 My Account

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

II. Agency, Office, Location and Role information are shown on the right section of this page. Note: The information reflected here determines which opportunities a location admin is able to manage on their account’s secured interface. Location Admins will manage opportunities, packages and users that are aligned with their agency/office location branch of the organization.

III. From the contact information tab, select the edit to make changes to contact fields.
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.
4 Manage FBO Notices

4.1 Create Notice

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

II. From the list, use the Add New button, located at the bottom of the page, to initiate a new notice. To create a notice, the user will walk through a stepwise process.

III. Alternatively, a user can use the quicklink Create Notice on their home page to initiate a new notice.
4.1.1 Step 1 – NOTICE TYPE

The first step establishes the following fields for the Notice:
I. Contracting Office Location– may be preset if that user is only affiliated with one office location.
II. Type
III. Solicitation Number
IV. Note data entered in step 1 cannot be edited later. Care should be taken to ensure accuracy of data entered.
V. Select proceed to move forward to step two.
4.1.2 Step 2 – NOTICE Details

I. The second step establishes the following fields for the Notice (asterisks indicate required form field):
   a. Title* - description of services, supplies, or project required. NOTE: 256 character limit.
   b. Classification Code*
   c. NAICS Code*
   d. Recovery and Reinvestment Act Action
   e. Response Date*
   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*

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

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

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

III. Alternatively a user can type the code (e.g., 10 or R) of the target value to navigate to the target selection and hit enter.
I. For the NAICS Code field, place the cursor on the field and start to type the code / or the text for the code. If you start to type part of a word found in a code, e.g., tex, the system will start to display terms with that term in the code.

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

III. Click the having problems with this field, click here button to have the system display a complete listing of NAICS codes which can be used for selection. Use the arrow key field to open a complete listing. Highlight the target code and hit enter.
I. When creating a notice, if you are having trouble cutting and pasting text to the description text box, click the icon with the letter T on the icon, or press the control and the v keys; doing either process will open a pop-up window that allows you to paste in plain text to the field. Note: It may take a few seconds for the pop-up window to open. Unless you use the icon, pop-up blocking will need to be disabled for this site.

II. Once the pop-up window is open, paste the text in the pop-up box and click insert (cancel aborts the process.) Text is converted to plain text and inserted at the top of the text field box. Note, insertion does not overwrite existing text in the field. Use the alignment, bold, italicize, and underline tools to add formatting to the plain text being inserted.

III. Note, IE 6 users, will be able to cut and paste, but will not have html editor or the icon.
There are four options at the bottom of the form which the user can use on this form.

I. The first is Go Back. Use of this button takes the user back to step one.

II. As the user is creating the notice, they may use the Save Draft option to save data entered for later edits/review. Notices saved in draft format will show with a red x for posted date on the notices list and they will only have the review/edit action available.

III. Quit Process and Return if used when the notice was not previously saved as a draft, means that the solicitation will not be saved (will not appear on the notice list).

IV. Proceed – takes the user to step three in the process.
4.1.3 Step 3 – Attachments

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

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

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

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

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

I. When a user is adding a new package, the first step is to indicate whether the attachment is a sensitive/secure package.
II. If no, see below Non-Secure Attachments.
I. If attaching sensitive/secure packages, the user is given the option to enter a new package or to select an existing (enter the PR# and use the find package button).

II. Users must also determine the Package Type; options will align with the notice type.
I. If adding new, a form will present that allows the user to set up the package.
II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

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

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

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

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

IV. If upload is chosen, the user is asked to specify the filename (note, user can use browse option to find the file) and to specify if the file is compressed (in .zip format). If link is chosen, the user is asked to specify the URL. Note - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

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

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

VII. Go Back button (bottom of form) takes the user back to step two in the process.

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

IX. Quit Process and Return does not attach the materials.

X. Proceed takes the user to the next step in notice creation process.
File / Link #1

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

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

- 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

Add New Package

Go Back  Save Draft  Quit Process And Return  Proceed
4.1.4 Step 4 – Review / Submit

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

I. The fourth step allows the user to review the notice and attachments and to submit the notice.

II. The go back button takes user back in reverse order of the previous steps (3, 2, 1) and allows the user to edit data entered in earlier steps.

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

IV. Quit Process And Return returns the user to the previous navigation.

V. Delete allows the user to delete the draft package (save draft must have been used previously to see this option).

VI. Print allows user to open the notice in a printer friendly format. See page for more details. See page 74 for more details.

VII. Post moves the notice for review by users.
4.2 Modify/Amend Notice

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

II. Additionally, a user can use the quicklink Mod/Amend Notice on their Home page to modify / amend a notice.
I. During the modification type step in the modify/amend process, the user indicates which step they would like to start with as they move forward:
   a. add to or edit the description
   b. attach files to the notice
   c. edit or create CLIN/Doc Packages (This option is only available if the Bid Module is enabled.)

II. The system will then present the appropriate steps to allow the user to make the requested modifications/amendments.

III. If making edits to notice details, they will be taken to notice details step.

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

**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 you are satisfied with your changes, you can click save draft to save this modification/amendment for later. Otherwise, click proceed to review your information.

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

Add The Following To Description:

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

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

IV. Save Draft saves the modification in draft notice.

V. Quit Process and Return does not save the modification.

VI. Proceed takes the user to the next step in notice modification process.
I. The next step allows the user to attach documents or packages to the notice. A Package is simply a collection of Documents bundled together for review.

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

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

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

I. When a user is adding a new package, the first step is to indicate whether the attachment is a sensitive/secure package.
II. If no, see below Non-Secure Attachments.
I. If attaching controlled, unclassified documents, the user is given the option to enter a new package or to select an existing one (enter the PR# and use the find package button).

II. The user must also identify the Package Type; options will align with the notice type.
I. If adding new, a form will present that allows the user to set up the package.
II. The form should be completed in sequence as displayed. The first section of the form establishes the terms used to define the package.

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

<table>
<thead>
<tr>
<th>Package #1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Is this package sensitive/secure?*</td>
</tr>
<tr>
<td>🟢 yes 🟡 no</td>
</tr>
<tr>
<td>Do you want to create new or attach/select existing?*</td>
</tr>
<tr>
<td>🟢 Create New 🟡 Attach/Select Existing</td>
</tr>
<tr>
<td>Package Type*</td>
</tr>
<tr>
<td>🟡 Solicitation</td>
</tr>
<tr>
<td>🟡 Mod/Amendment</td>
</tr>
<tr>
<td>🟡 Other (Draft RFPs/RFs, Responses to Questions, etc..)</td>
</tr>
<tr>
<td>PR #:</td>
</tr>
<tr>
<td>Project #:</td>
</tr>
<tr>
<td>NSN / MMAC:</td>
</tr>
<tr>
<td>Part Number #:</td>
</tr>
<tr>
<td>Nomenclature:</td>
</tr>
</tbody>
</table>

* indicates a required field

I. After setting up the terms to name the package, the user will indicate the controls for access, CD availability.
II. Once the secure package has been added, use add new package to add another package or proceed to go to the next step.
Is this Export Controlled?:
Note: To download documents that are designated as "export controlled," vendors must be certified as a U.S. or Canadian contractor by the Joint Certification Program (JCP) administered by the Defense Logistic Information Service (DLIS). To apply for this certification, Vendors must submit form DD2345.

- yes  - no

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

- yes  - no

Is CD Available*:

- yes  - no

File / Link #1

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

[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

Add New Package

Go Back  Save Draft  Quit Process And Return  Proceed
Non-Secure Attachments

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

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

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

IV. If upload is chosen, the user is asked to specify the filename (note, user can use browse option to find the file) and to specify if the file is compressed (in .zip format). If link is chosen, the user is asked to specify the URL. Note - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

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

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

VII. Go Back button (bottom of form) takes the user back to step two in the process.

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

IX. Quit Process and Return does not attach the materials.

X. Proceed takes the user to the next step in notice creation process.

Attachments

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

Package #1

Is this package sensitive/secure?*
- yes
- no

Package Type:
- Solicitation
- Mod/Amendment
- Other (Draft RFPs/RFs, Responses to Questions, etc.)

File / Link #1

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

File:
For files over 10 Mo, 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
I. At step five, the user is able to review materials, and if appropriate to post the modification/amendment for vendor review. Note: If the Bid Module is enabled, Step 5 would be the Bids step.

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

III. The save draft button saves the modifications in draft format.

IV. Quit Process And Return returns the user to the previous navigation.

V. Post moves the notice for review by users.
4.3 Create Award

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

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

III. If a notice is not eligible for award, the award icon will be grayed out and non-selectable.
I. In creating an award notice, the user is required to enter the contract award date, contract award number, contract dollar amount, and awarded contractor name.

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

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

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

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

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

VII. Proceed moves the user forward in the stepwise process.
I. The next step allows the user to attach documents or packages to the award notice. A Package is simply a collection of Documents bundled together for review.

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

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

IV. **Note: See section 4.1.3 for detailed information on this step.**
Non-Sensitive Attachments

I. After the document package(s) have been added, if applicable, the user can take any of the following actions:
   a. Go Back button (bottom of form) takes the user back to step two in the process.
   b. Save Draft saves the materials to the draft notice.
   c. Quit Process and Return does not attach the materials.
   d. Proceed takes the user to the next step in notice creation process.
I. At the final step in the process, the user is able to review materials, and if appropriate to post the modification/amendment for vendor review.

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

III. The save draft button saves the modifications in draft format.

IV. Quit Process And Return returns the user to the previous navigation.

V. Post moves the award notice for review by users.
4.4 Cancel Notice

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

II. Additionally, a user can use the quicklink cancel notice on their Home page to cancel a notice.
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 users.
4.5 Deletion of Draft Notices

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

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

I. A user can archive a notice from the main procurement notices list of notices. To archive a notice, the user can click on the review icon for the list item to open the draft notice.

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

I. User will be asked to confirm the archive.
Are you sure you want to archive this notice? This will archive all related notices, documents, links and controlled unclassified documents.

OK  Cancel
4.7 Unarchive Notices

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

II. To unarchive the notice, from the archived sub tab, click on the view icon for the notice.
I. Select unarchive to return the notice and associated documents to active status.
II. The system will prompt the user to confirm this operation.
4.8 Print Notices

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

For draft notices, the print option is available at the review/submit step of the notice.
4.9 Review Interested Vendors List

I. To review the interested vendors list for a solicitation, use the review icon to open the solicitation from the procurement notices list.

II. Go to the interested vendors sub-tab.
5 Bid Module

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

5.1 Enable / Disable Bid Module

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

IV. Click on the Edit button.

V. At the bottom of the Edit Location tab, there are two fields which are used to set the permission level for the Bid Module for all buyers registered at that location:
   1. Allow CLIN Template:
1. If set to Allow, buyers can create an Item (CLIN) Builder template as a possible vendor response type for any notice;
2. If set to Not Allow, buyers cannot create Item (CLIN) Builder templates as a possible vendor response type for any notice;
3. If set to Ignore, buyers cannot create Item (CLIN) Builder templates as a possible vendor response type for any notice.

ii. Allow Doc Package:
1. If set to Allow, buyers can enable document (file) uploads as a possible vendor response type for any notice;
2. If set to Not Allow, buyers cannot enable document (file) uploads as a possible vendor response type for any notice;
3. If set to Ignore, buyers cannot enable document (file) uploads as a possible vendor response type for any notice.

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

5.2 Create Notice
The Bid Module functionality allows buyers to receive and electronically evaluate vendor responses to notices. If the Location Administrator enables this feature, there will be an
additional step included in the Create Notice process outlined in section 4.1 called Bids. Note, Location Administrators can choose to enable or disable the two response types (CLIN and Doc Package) independently from one another.

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

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

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

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

f. (Undelete): If Buyer deletes a line item, the button will change to allow the buyer to (Undelete) the line item which will retain the values entered previously.

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

VI. After clicking Proceed, the buyer can review the type(s) of electronic submission selected and if applicable, the CLIN template created.
VII. The Buyer has four options at the bottom of this page:
   a. Go Back returns to the previous step in the process where changes can be made;
   b. Save Draft saves data entered up to this point for later edits/review;
   c. Quit Process And Return means that the solicitation will not be saved if selected
      when the notice was not previously saved as a draft;
   d. Proceed takes the user to the next step in the process, Review/Submit. See
      section 4.1.4 for more information on the next step.

5.3 Modify/Amend Notice

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

II. Additionally, a user can use the quicklink Mod/Amend Notice on their My FBO page to
modify / amend a notice. (See section 4.2.)

III. During the modification type step in the modify/amend process, the user indicates at
which step they want to start the modification process:
   a. add to or edit the description (see section 4.2)
   b. attach files to the notice (see section 4.2)
   c. bids (CLIN/Doc Packages)

New Amendment for Bid Mod Test 39 - MM-FBO-039
IV. If the user indicates that they would like to start the modification process at the Bids section, the system will first allow the user to review/modify the type(s) of electronic submission previously selected (CLIN and/or Doc Package).

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

VI. At the bottom of the form for step five Bids - Type, there are five options:
   a. Go Back takes the user to step four Attachments;
   b. Save Draft saves the modification in draft notice;
   c. Quit Process and Return does not save the modification;
   d. No Change, Continue to Review Step does not save any changes made to the form and takes the user to step six Review / Submit;
   e. Proceed saves any changes made to the form and takes the user to the next step in the modification process.

VII. If the user selects the CLIN type option and clicks Proceed, the system will provide a CLIN Template for completion or modification.
   a. If the user previously created a CLIN template and then disabled the option, the system will recall the original template for modification at this time.
   b. The user can make any changes to the CLIN template form, including:
      i. Edit Line Item Description;
      ii. Edit Quantity;
      iii. Add and/or Delete Line Item;
      iv. Add and/or Delete Child Line Item.

VIII. At the bottom of the form for step five Bids – CLIN Template, there are five options:
   a. Go Back takes the user to step five Bids - Type;
   b. Save Draft saves the modification in draft notice;
   c. Quit Process and Return does not save the modification;
   d. No Change, Continue to Review Step does not save any changes made to the form and takes the user to step six Review / Submit;
   e. Proceed saves any changes made to the form and takes the user to the next step in the modification process; note, if the user selects Proceed, the system will provide the following warning message:
IX. After clicking OK, the system will move to the next step, Bids – Review at which point the user can review the type(s) of electronic submission selected, if any, as well as the CLIN template created, if applicable. There are four options at the bottom of the review page:
   a. Go Back takes the user to step five Bids – CLIN Template;
   b. Save Draft saves the modification in draft notice;
   c. Quit Process and Return does not save the modification;
   d. Proceed saves any changes made to the Bids section and takes the user to the next step in the modification process.

X. At step six, the user is able to review materials, and if appropriate to post the modification/amendment for vendor review; see section 4.2, page 57 for more information on this final step in the modification process.

5.4 Manage Vendor Electronic Responses

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

II. If there are no vendor electronic submissions, the tab will indicate no items found:
III. If available, vendor electronic response submissions will be displayed in spreadsheet fashion and will provide the following information:
   a. Vendor’s first and last name;
   b. Vendor’s company name;
   c. DUNS if available;
   d. Type(s) of electronic submission;
   e. Total Bid amount;
   f. Date the response was submitted.

IV. Click on the View icon 📊 to review the details of a vendor’s electronic response; the system will display two sub-tabs for each response submitted, Core and Notes:
   a. The Core sub-tab provides details of the response, including:
      i. Additional contact information for the vendor, including full name, company name, email address, and telephone number;
ii. The CLIN template, if applicable, as completed and submitted by the vendor with a Unit Price and Total price (Quantity multiplied by the Unit Price) per line item, as well as a Grand Total price for all line items;

<table>
<thead>
<tr>
<th>Line Item Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Item #1</td>
<td>1000</td>
<td>2.50</td>
<td>2,500.00</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td>2,500.00</td>
</tr>
</tbody>
</table>

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](#) (8.00 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.
b. The Notes sub-tab allows the user to enter and save notes for each electronic response submission:
   i. If there are no notes saved, the system will indicate No Items Found;
   ii. To create a note, click on the Add New Note button located at the bottom of the page;
   iii. The system provides a text field where the user can enter in Note Information;
1. Submit saves the text entered and returns the user to the main Notes sub-tab listing all saved entries;
2. Save saves the text entered and keeps the user within that particular note for review;
3. Return does not save the text entered and returns the user to the main Notes sub-tab listing all saved entries.

iv. A user can view and/or edit a note entry at any time by opening the Notes sub-tab within a response and clicking on the View icon next to the desired note.

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

V. A user can download all or a select number of vendor responses into a Zip file by following these steps:
   a. Within the Bids/Responses tab of a particular notice, select the responses to be downloaded using the checkboxes next to each response;
   b. Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;
   c. Next, click on the down arrow next to Batch Options and select the Download Zip option;
VI. Users can also send email messages to selected vendors by following these steps:
   a. Within the Bids/Responses tab of a particular notice, select the response(s) for which you would like to send an email message to the associated vendor(s) using the checkboxes next to each response;
   b. Note, to select (or deselect) all responses, the user can simply click on the plus (or minus) sign at the top of the checkbox column;
   c. Next, click on the down arrow next to Batch Options and select the Mail option;
   d. The system opens Mail Wizard sub-tab which provides instructions for creating an email message to the vendors selected in the previous step:
      i. Enter the Subject of the email message;
      ii. The system will automatically enter in the email addresses on file for the vendor response(s) selected by the user;
      iii. If desired, enter the email address(es) for the people who should be carbon copied (Cc) and/or blind copied (Bcc) on the email message;
      iv. Use the yes/no radio buttons to indicate if the message should be formatted using HTML;
v. Enter the message body, including any merge fields which are identified in the right side bar; the user can either type the identifier (including the brackets) directly into the text body, or click on the blue text in the side bar to insert the information wherever needed.

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

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

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

5.5 Create Award

I. From any page on the system, a user can go to upper navigation Notices button and then use the create award button to add an award to the notice. Look for: (see section 4.3.)

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

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

IV. If the Bid Module is enabled for a user’s notice and there are vendor electronic responses submitted, the user can also initiate the award process directly from the Core sub-tab of an electronic response by clicking on the Create Award Notice button. (Note, this button will only be present if the notice is eligible for award.)
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.

See section 4.3 for detailed information on the steps required to continue processing an award.

5.6 Cancel Notice
See section 4.4.

5.7 Deletion of Draft Notices
See section 4.5.

5.8 Archive Notices
See section 4.6.

5.9 Unarchive Notices
See section 4.7.

5.10 Print Notices
See section 4.8.

5.11 Review Interested Vendors List
See section 4.9.

6 Non-FBO Secure Document Link

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

6.1 Create Non-FBO Secure Document Link

I. From procurement notices navigation, go to Non-FBO Solicitation sub-tab to see list of Non-FBO Solicitations.
II. Red x in the released column indicates the Non-FBO solicitation is in draft format (not released yet). A date in this column, means the Non-FBO solicitation was released on this date.

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

II. Note: The solicitation # and archive date (not shown in image below) must be entered before the save draft button can be used to save the Non-FBO Solicitation in draft format.

III. Cancel returns the user to the list of Non-FBO Solicitations (at bottom of form, not shown in screen shot).

IV. Proceed takes the user to the next step in the process (at bottom of form, not shown in screen shot).
I. The next step of creating a Non-FBO form allows the user to add the secured package(s).

II. The user can create new or attach/select existing secured package.

III. Contingent on the response, the system will prompt users to enter data as appropriate.

IV. Use the Attach Additional Secure Package button to add additional packages to the Non-FBO Solicitation.

V. Go Back takes the user back one step in the process (at bottom of form, not shown in screen shot).

VI. Use the save draft button to save the Non-FBO Solicitation in draft format (at bottom of form, not shown in screen shot).

VII. Cancel returns the user to the list of Non-FBO Solicitations (at bottom of form, not shown in screen shot).

VIII. Proceed & Review takes the user to the final step in the process (at bottom of form, not shown in screen shot).
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.
I. The link for the Non-FBO solicitation is displayed in the Details sub-tab when viewing the Non-FBO Solicitation from the list of notices.

II. Vendors must log in after clicking that link and will see the uploaded packages - and can request access etc., the same way they would for FBO Solicitations. Users will manage explicit access requests in the same way as described for FBO solicitations.
6.2 Un-release Non-FBO Secure Document Link

I. Users can un-release Non-FBO solicitations. Doing so renders the Non-FBO Solicitation link nonfunctional and vendors trying to view the link of an unreleased Non-FBO solicitation will receive an error message.

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

III. To unrelease a previously released Non-FBO document, go to Procurement Notices and the Non-FBO Solicitations sub-tab. Click on the review tab to open the previously released item.
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
6.3 Delete Draft Non-FBO Secure Document Link

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

II. To delete a draft item, the user can click on the review icon for the list item to open the draft notice.
I. Within the Non-FBO notice use the proceed option to move forward to the review/submit step

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

7.1 Add New Document Package to Existing Notice

I. From the Document / Links main navigation, users can create and assign new documents to released solicitations.

II. Use the add new button.

III. Additionally, a user can use the quicklink upload new documents/links on their Home page to add a new package.

IV. Note: If you create new documents using this resource, and save the materials as drafts, the resources will remain as drafts in the system until they are posted, or deleted.
I. At step one, Details, the user indicates whether the document is secure/sensitive, tied to a FBO solicitation, and completes the other elements of the document package creation process (fields will appear conditionally based on user responses).

II. At the bottom of the form, Save Draft saves the materials to the draft notice, Quit Process and Return returns the user to the list of document packages and Proceed moves the user forward in the stepwise process.
I. At step two, the user uploads files.
II. A description is required.
III. Bottom of page, Go back allows the user to go back in the stepwise process.
IV. Save Draft saves the materials to the draft notice.
V. Quit Process and Return returns the user to the previous navigation.
VI. Proceed & Review moves the user forward in the stepwise process.
I. At step three, review/submit, the user is able to review materials, and if appropriate to use post documents.

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

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

IV. Quit Process and Return returns the user to the previous navigation.

V. Post Documents adds the Package for use in the system.

---

[New Documents/Links]

Return to Documents/Links | Return to list (Documents/Links)

---

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

---

Package Details

Is this a secure/sensitive package?:
no

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

Type:
Mod/Amendment

---

Files / Attachments

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

---

Go Back   Save Draft   Quit Process And Return   Post Documents
7.2 Edit Document Package

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

II. To edit a document package, go to main navigation documents/links, and select the package link (Label/PR#) for the package to be edited. This opens the details of the package.

III. When details are open, select the edit button.
I. After edit is selected, user sees message indicating why edits are allowed, and will need to confirm the desire to make edits to the package.

![Image](image.png)

**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 document package creation.
7.3 Delete Document Package

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

II. To delete a document package, go to main navigation documents/links, and select the package link (Label/PR#) for the package to be deleted. This opens the details of the package.

III. When details are open, select the delete button.
I. After delete is selected, user sees message asking for confirmation that they desire to delete the package.

![Image of confirmation message](image-url)
7.4 Manage Explicit Access Requests

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

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

III. Alternatively, a user can navigate to the authorized parties list from the Documents/Links main navigation, and selecting the authorized Parties sub-tab.
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.
7.5 Review Authorized / Rejected Explicit Access Requests

I. To review the previously authorized / rejected explicit access requests, go to the Notice of interest, then the packages sub-tab and finally, the authorized parties sub-tab.

II. Authorized vendors will be listed on the authorized sub-tab.

III. Previously rejected requests will be listed on the rejected requests sub-tab.
7.6 Document Audit Trail

I. For controlled, unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the audit trail sub-tab of a released document.

II. Go to main navigation Document / Links. For the document package you would like to review, click on the package link (not the actual document file link(s)).
I. When the Document package record is opened, it defaults to the details sub-tab for the record. Click on the audit sub-tab, to review the listing of vendor review.

II. On the audit trail sub-tab, the system will list out each time a document was viewed (note, if viewed multiple times by the same vendor, each occurrence will be reflected in the list.)

III. Click the review icon to open the audit trail record.
I. The audit trail record details the specifics of the controlled, unclassified document review.
II. Return closes the record.
8 Manage Location

8.1 Edit Location Profile

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

I. Click the Edit button which opens the record for edits.

II. Submit enters the data for the record and submits the user’s changes (returns user to the previous list).

IV. Save enters the data for the record and keeps the user in the record.

V. Return, takes the user back to the prior screen without making any changes since the record was last saved.
8.2 Manage Agency User Accounts

I. Pending agency account requests that a location admin account is managing will show on the pending actions section of the Home page for that account.
8.2.1 Approving Email Verified New Registrations

I. All registrants will receive an e-mail after submitting a registration form which allows them to confirm the validity of their identity/email. Users should follow the directions in the e-mail (they have to verify their email address).

II. When the new registrations list is opened, users will see a listing of pending registrations where the email has been verified.
I. When the registration record is opened, the user can approve registration, which allows the registrant to begin to use the system per their registration (e.g., as a buyer for that agency as shown on the form).

II. Approved registrants receive email notification when their account has been approved.

III. If reject is selected, the user is asked to confirm that entry. The registration record is deleted when rejected. Reject cannot be undone. Users are asked to confirm this selection.

IV. If Return to List is selected, the registration remains pending in the new registrations list and can be reviewed later.
I. If edit is selected, the registrant’s record is opened and a user can make edits to the record.

II. Use save changes to save any edits to the registrant’s record.
8.2.2 Approving Email Un-verified New Registrations

I. If a registrant indicates that they have registered, but their registration is not on the new registrations list, it is possible that the user has not verified their email address (required step after a user submits registration form).

II. To review the list of unverified email registrations, use the more filter to show a list filter that will allow you to see verified no.

III. Unverified email accounts are indicated by the red x in the verified column on the list.

IV. Users can still move forward with approving the unverified registration, but should ensure that the email is correct. System communication (including the notification of the approved account), will be sent to the email indicated on the registration form.

V. Follow steps as described above for reviewing a verified registrant.
8.2.3 Create an Agency Account

I. To create a new user account, go to main navigation Contacts.

II. Use the Create New Agency User button to create a new agency user.

III. See Electronic Accounts for information on creating email/ftp accounts in the system.

IV. The New Agency User form is opened and the user can enter the core details for the new record.

V. Because this new account was entered from Buyer’s list, the account is set to be no for Electronic Submission Account. Electron submission accounts can only use electronic submission (FTP/email) methods to submit materials to the system.

VI. Select next to move forward in the record creation process.
VII. In the next step, the Admin user establishes the Account for the new user.

VIII. Cancel can be used to quit the process without saving the new record.

IX. Select next to move forward in the record creation process.

X. In the next step, the Admin user establishes the Username/Password for the new user.

XI. Select save to save the new user in the system.

XII. Return quits the process without saving the new record.
8.2.4 Electronic Accounts

I. Users that are set up for Electronic Accounts will only be able to submit materials to the FBO system via email or FTP (electronic methods).

II. To add a new user with this sort of functionality, go to the main navigation, Agencies and the sub-tab Electronic Accounts. Use the Create New Electronic Account button to enter a new user.

III. Doing so opens a new agency form, with the setting for electronic account set to yes.

IV. Enter required fields and select next.
V. Users should then complete the account user rights for the new user per presented forms.

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

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

8.3.1 Email Users

I. From the Contacts / Electronic Accounts list of accounts, the user can send an email via the system to all or select members of the list.

II. Open the contacts list and use the + selection tool to select all users for inclusion in the distribution list of the email being sent. The - will deselect all in the list.

III. If not intended for all, use the checkmark to select specific recipients.

IV. Once selections have been made, select the batch options tool, and the mail, and new message options.

V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the - tool to deselect all if you wish to do another batch operation that targets a different list of users.
I. Once new message is selected, a mail wizard opens which allows the user to compose a message.

II. Use message options to save the message for future use.

III. Available mail merge fields are shown in the list of available fields.

IV. At the bottom of the page (not pictured), attachments can be added to the message.

V. Hit next to go to the next step in the process.

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

I. From the Contacts or Electronic Accounts list of accounts, the user can save a list of all, or select members, of the list to excel format.

II. Open the contacts list, and use the + selection tool to select all users for inclusion in the excel list. The - will deselect all in the list.

III. If not wanting to include all in the file, use the checkmark to select specific recipients.

IV. Once selections have been made, select the batch options tool, and the save as excel, and either this page or selected records options.

V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the - tool to deselect all if you wish to do another batch operation that targets a different list of users.

VII. Follow your browser prompts to open or save as excel file.

VIII. System will create excel file with select fields for the buyer accounts selected.
<table>
<thead>
<tr>
<th>A</th>
<th>Last Name</th>
<th>First Name</th>
<th>Agency</th>
<th>Title</th>
<th>Email</th>
<th>Phone</th>
<th>Username</th>
<th>Logins</th>
<th>Last Login</th>
<th>Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>admin</td>
<td>user</td>
<td>Sample</td>
<td></td>
<td></td>
<td></td>
<td>user@fl</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>agency</td>
<td>nancy</td>
<td>Sample</td>
<td></td>
<td></td>
<td>test</td>
<td>nancyag</td>
<td>0</td>
<td>2008-04-15</td>
<td>Agency, Administrator</td>
</tr>
<tr>
<td>4</td>
<td>Buyer</td>
<td>Billy</td>
<td>Sample</td>
<td></td>
<td></td>
<td></td>
<td>billybe</td>
<td>0</td>
<td></td>
<td>Buyer</td>
</tr>
<tr>
<td>5</td>
<td>Engineer</td>
<td>Suzie</td>
<td>Sample</td>
<td></td>
<td></td>
<td></td>
<td>suzie@</td>
<td>0</td>
<td></td>
<td>Engineer</td>
</tr>
<tr>
<td>6</td>
<td>murray</td>
<td>non</td>
<td>Sample</td>
<td></td>
<td></td>
<td></td>
<td>non@gr</td>
<td>0</td>
<td></td>
<td>Buyer</td>
</tr>
<tr>
<td>7</td>
<td>Warehouse</td>
<td>Dudley</td>
<td>Sample</td>
<td></td>
<td></td>
<td></td>
<td>Dudley@</td>
<td>dudley</td>
<td>0</td>
<td>Engineer</td>
</tr>
</tbody>
</table>
8.3.3 Save to Text File

I. From the Contacts or Electronic Accounts list of accounts, the user can save a list of all, or select members of the list, to text file format.

II. Open the contacts list and use the + selection tool to select all users for inclusion in the text file list. - will deselect all in the list.

III. If not wanting to include all in the file, use the checkmark to select specific recipients.

IV. Once selections have been made, select the batch options tool, and the save as test file, and either this page or selected records option.

V. Note, even after you are done with this batch action, batch selections will remain selected for possible use again during the user session. Use the - tool to deselect all if you wish to do another batch operation that targets a different list of users.

VI. Follow your browser prompts to open or save the text file.

VII. System will create text file with select fields for the buyer accounts selected.

8.3.4 Edit Roles

I. From the Contacts or Electronic List of accounts, the user can edit user roles.

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

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

I. Click on the edit icon to disable an account. Disabled accounts are not deleted from the system, but users cannot access the system if they are disabled.

II. If edit is selected, the registrant’s record is opened and a user can make edits to the record.

III. Go to the Username / Password tab and change the field disabled account from no to yes to disable the account.

IV. Select save to save the disabled status for the user in the system.

V. Return quits the process without saving changes to the record.
8.5 Delete an Account

I. Click on the edit icon to delete an account.

II. If edit is selected, the registrant’s record is opened and a user can make edits to the record.

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

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