

FBO.GOV Engineer Guide 1.6

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Table of Contents:

1	System Overview.....	3
1.1	Definition of key terms	5
2	Logging onto the System	9
2.1	System URL	9
2.2	Navigation Bar on Logon Page – Unsecured features	9
2.3	Register for an Account	10
2.4	Returning Users – Log into the system	15
2.4.1	Captcha Security	16
2.4.2	FBO Terms and Conditions.....	17
3	Engineer’s Secured Interface.....	18
3.1	session time out	18
3.2	Top of Page Navigation	18
3.2.1	My FBO	19
3.2.2	Multi-account Users	20
3.2.3	My Profile	22
3.2.4	Document Packages.....	25
4	Document Packages.....	26
4.1	Create New Document.....	26
4.2	Delete Document Package.....	30
4.3	Edit Document Package	32
5	Manage Explicit Access Requests	34
6	Document Audit Trail	38

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-secure docs (and attach existing controlled, unclassified docs to notices)
 - 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 controlled, unclassified documents and to create/post solicitations notices.
- **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


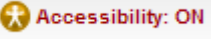
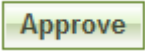
- MPIN (Marketing Partner Identification Number) – Optional profile field required to view controlled, unclassified materials.
- Vendor Opportunity Review Features: Vendor can search for opportunities based on the following terms:
 - Keyword or Solicitation Number
 - Opportunity/Procurement Type
 - Posted 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




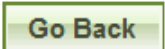



Vendors can set up search agents based on detailed search elements which highlight newly added opportunities aligning with their search criteria. Vendors can add opportunities to a watched list (akin to a favorites list). Per the vendor's profile status, vendors can review documents associated with the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



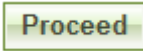
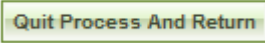

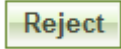





- Opportunity Actions: Vendors are able to add themselves to the interested vendors list for an opportunity. If the buyer has indicated that reviewing vendors are able to review other interested vendors, vendors can review the list of vendors who have expressed interest in the opportunity. Vendors can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

1.1 Definition of key terms

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

Term	Icon	Description
Accessibility	 or 	Accessibility Mode – Disables select interface enhancements to ensure users of assistive technologies have full and equal access to all aspects of this web site. Icon is red if accessibility mode is on or blue if accessibility mode is off.
Account	n/a	From an account, a user is designated as a representative for a particular agency or office. Because some users are associated with multiple agencies/offices, they will have multiple accounts tied to their username.
Approve		The Approve button is used to approve a vendor’s request for explicit access to controlled, unclassified documents.
Audit Trail	n/a	For controlled, unclassified documents, the system tracks each time a vendor reviews the record. This is captured in the audit trail sub-tab of a released document.
Authorized Party	n/a	Certain controlled, unclassified package(s) require that a vendor be explicitly authorized to review the materials. A government user can pro-actively select a vendor user for access, or a vendor can request and be granted access, through this system. Once the vendor is given explicit access to review the package, they are an authorized party.
Authorized Vendor	n/a	Export Controlled requires that the vendor's company be certified by the 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.
Buyer	n/a	Government user that is presenting an opportunity notice in the system.
CAGE Code	n/a	Commercial and Government Entity (CAGE) Code - A CAGE Code is a five (5) position code that identifies companies doing, or wishing to do business with the Federal Government. The format of the code is the first and fifth position must be numeric. The second, third and fourth may be any mixture of alpha/numeric excluding I and O. All positions are non-significant. The code provides for a standardized method of identifying a given facility at a specific location.

Clear		The Clear button appears when a users is using search filters. If selected, the system clears any previously entered search filters.
Document	n/a	Document is a single attachment (either link or uploaded document) that can be attached to a Notice. A collection of documents can be bundled to create a Package
Draft		Saved, but not necessarily complete. Drafts are not viewable on vendor interface.
DUNS	n/a	DUNS (Data Universal Numbering System) Number - According to the FAR 4.11, prospective vendors must be registered in SAM (System for Award Management) prior to the award of a contract; basic agreement, basic ordering agreement, or blanket purchase agreement. According to FAR 52.204-7, to register in SAM, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS Number is assigned by Dun & Bradstreet, Inc. (D&B) to identify unique business entities.
Engineer	n/a	User that can post / update controlled, unclassified documents for use as attachments to Opportunities. Engineers are registered for a particular agency/office and usually location. Buyers of the same office will see unattached technical packages when posting notices for attachment.
Explicit Access	n/a	Vendor is given explicit access to review controlled, unclassified package(s). A government user can proactively select a vendor user for access, or a vendor can request and be granted access, through this system.
Export Controlled	n/a	Export Controlled requires that the vendor's company be certified by the DLA Logistics Information Service's Joint Certification Program (JCP) to receive unclassified technical data disclosing military critical technology with military or space application. This system receives a daily feed of authorized vendors, which determines access based on a vendor's CAGE code/MPIN.
Form	n/a	Any screen where a user enters data that is saved in the system.
Go		If data is entered in keyword search filter, select the Go button to submit the request.
Go Back		During a stepwise process, use of the go back button takes the user back one step in the process.
Help	 or 	Throughout the system, the system presents users with the opportunity review system Help messages. The icons presented here will take the users to the help message that is available.
Log-in		Use username and password to logon to an account on the system

Logout		The Logout button can be used to log the user off the system.
MPIN	n/a	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.
Non-FBO Solicitation Link	n/a	Buyers can create links to controlled, unclassified documents posted in the FBO system for viewing outside the context of FBO notices. Non-FBO solicitations, when released in the system, support a link (URL) to the Non-FBO solicitation's controlled, unclassified document packages. The Non-FBO link can be used in other systems, or documents, and when clicked by a vendor will link the vendor to the Non-FBO materials. The system controls vendor access (e.g., explicit access, export control) to the Non-FBO solicitation in the same manner as it does for a FBO solicitation. Non-FBO links were previously managed through FedTeDS.
Package		Collection of documents that can be attached to a notice.
Proceed		The Proceed button saves the entered data on a form and takes the user to the next step (first prompting users to complete required fields on the form).
Quit Process and Return		The quit process and return button returns the user to the previous page, without updating any record fields.
Register		Request a user account on the system.
Reject		The Reject button is used to reject a vendor's request for explicit access to sensitive, but unclassified documents.
Release Package		Finalizes a Package and releases for use by a buyer.
Required Field	*	A red asterisk next to a field label indicates that the field is a required.
Return		The return button returns the user to the navigation.
Review or view		Review opens an object for review.
Save		The Save button saves the entered data on the form. User will be required to complete all required fields on the form.
Save Draft		The Save Draft button saves the entered data in a draft document, (user is not required to complete

		required fields on the form).
Controlled, Unclassified Document	n/a	Vendors are required to logon to the system and to have a valid MPIN on file, to review controlled, unclassified documents. Export Controlled and explicit access are more stringent access controls that may also apply to controlled, unclassified documents.
Sub-tab	n/a	These are sections of a main navigation that a user can move to while in that main navigation (e.g, my profile is a main navigation, and account and contact information are sub-tabs in that main navigation).
Username	n/a	All users will have one username. The username is used to log into the system.
Vendor	n/a	Provider of services.

2 Logging onto the System

2.1 System URL

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

2.2 Navigation Bar on Logon Page – Unsecured features

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

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

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the navigation bar includes links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. A search bar highlights over 33,300 active federal opportunities, with filters for Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), Type (Any), and Keyword/Solicitation #. A 'Search' button is provided, along with a link to an advanced search form. A lightbulb icon indicates an attention note for agency users regarding document uploads. The page is divided into two main user sections: 'Buyers / Engineers' and 'Vendors / Citizens'. Each section includes a login form with fields for Username and Password, and a 'Login' button. The 'Buyers / Engineers' section also lists links for 'View Opportunities', 'Register Now', 'Password Reminder', and 'Recovery FAQs'. The 'Vendors / Citizens' section lists links for 'Find Opportunities', 'Register Now', 'Password Reminder', and 'Recovery FAQs'. On the right side, there are sections for 'RECOVERY' (with search buttons for opportunities and awards), 'SMALL BUSINESS EVENTS' (with a search button), and 'VENDOR COLLABORATION' (with a search button). A 'USER GUIDES' section at the bottom right provides links for Buyer, Vendor, Engineer, and Location / Agency Admin. A footer note suggests using Adobe Acrobat Reader for PDF files.

2.3 Register for an Account


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

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

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the site logo and navigation tabs (Home, Getting Started, General Info, Opportunities, Agencies, Privacy) are visible. A search bar highlights over 33,300 active federal opportunities, with filters for Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), Type (Any), and Agency. A 'Search' button is provided. Below the search bar, an attention notice states that agency users are responsible for properly uploading controlled materials. The page is divided into two main user sections: 'Buyers / Engineers' and 'Vendors / Citizens'. The 'Buyers / Engineers' section includes a login form with fields for Username and Password, and links for 'View Opportunities', 'Register Now', 'Password Reminder', and 'Recovery FAQs'. The 'Vendors / Citizens' section includes a similar login form and links for 'Find Opportunities', 'Register Now', 'Password Reminder', and 'Recovery FAQs'. On the right side, there are several informational panels: 'RECOVERY' (with search buttons for opportunities and awards), 'SMALL BUSINESS EVENTS' (with a search button), 'VENDOR COLLABORATION' (with a search button), and 'USER GUIDES' (with links for Buyer, Vendor, Engineer, and Location / Agency Admin). A footer note at the bottom right suggests using Adobe Acrobat Reader for PDF files.

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

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

 Accessibility

Buyer/Engineer Registration

[RETURN TO HOME](#)

1 Personal Information

▼

2 Account Information

▼

3 Review/Submit

FedBizOpps (FBO) Registration Form for Federal Users * indicates a required field

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

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

Your Suffix:
If applicable, enter your suffix.

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

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

Phone*:
Enter your phone number

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

Buyer/Engineer Registration

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

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

Account Information * indicates a required field

Agency*:

Choose your agency down to the lowest level

User Role(s)*:

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

Buyer Engineer Office Location Administrator

Username*:

Please choose your login username now

Desired Password*:

Enter the password you wish to use to gain access to the system.

For security purposes, the password must meet the following criteria:


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

Repeat Desired Password*:

Repeat the password you entered in the previous field to verify it was entered correctly.

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

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

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

FedBizOpps (FBO) Registration Form for Federal Users

Your Full Name:
nancy

Your Suffix:
n

The Title of Your Position:
n

Your Email Address:
n@simplicity.com

Account Information

Agency:
AGENCY FOR INTERNATIONAL DEVELOPMENT

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

Contracting Office (Enter Manually):
test

User Role(s):
Engineer

Username:
testeng

Desired Password:

Repeat Desired Password:

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



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

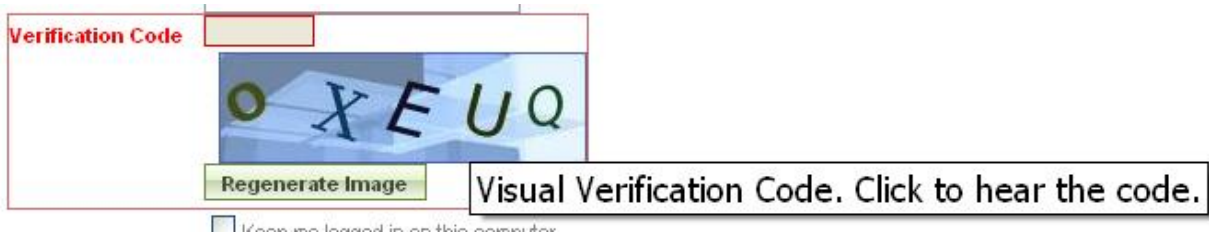
2.4 Returning Users – Log into the system

- I. Point your browser to <https://www.FBO.gov> and enter username and password.
- II. Click Login to continue.
- III. The Password Reminder option allows a user to request a password via email.

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, there is a navigation menu with links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. A search bar is prominently featured, indicating over 200 active federal opportunities. Below the search bar, there are several filter options: Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), and Type (Any). A search button is located below these filters. To the right of the search bar, there is a section for RECOVERY opportunities, with buttons for searching recovery opportunities and awards. Below this, there are links for FBO RECOVERY REPORTS, including Opportunities and Awards. Further down, there are USER GUIDES for Buyer, Vendor, Engineer, and Location / Agency Admin. At the bottom of the page, there are two main sections: Buyers / Engineers and Vendors / Citizens. Each section has a login form with fields for Username and Password, and a Login button. The Buyers / Engineers section also includes links for View Opportunities, Register Now, Password Reminder, and Recovery FAQs. The Vendors / Citizens section includes links for Find Opportunities, Register Now, Password Reminder, and Recovery FAQs. A footer at the bottom of the page contains the text 'Copyright © 2013', 'www.FBO.gov', and 'Page 15 of 41'.

2.4.1 Captcha Security

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



2.4.2 FBO Terms and Conditions

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

FBO Terms and Conditions

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

CONTROLLED UNCLASSIFIED INFORMATION PROPERTY OF THE UNITED STATES GOVERNMENT

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

Please dispose of controlled unclassified information when no longer needed.

I. Usage Agreement

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

3 Engineer'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 Top of Page Navigation

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

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



3.2.1 My FBO

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

- I. Announcements – System Announcements posted for the user’s reference.
- II. Pending Actions – Tally of the pending actions, (e.g, number of explicit access requests in need of processing).
- III. Video Demonstrations – Training videos for specific functionality
- IV. Account Switcher – This will only appear if the user has multiple accounts, i.e. registered under more than one Agency and/or Office Location.

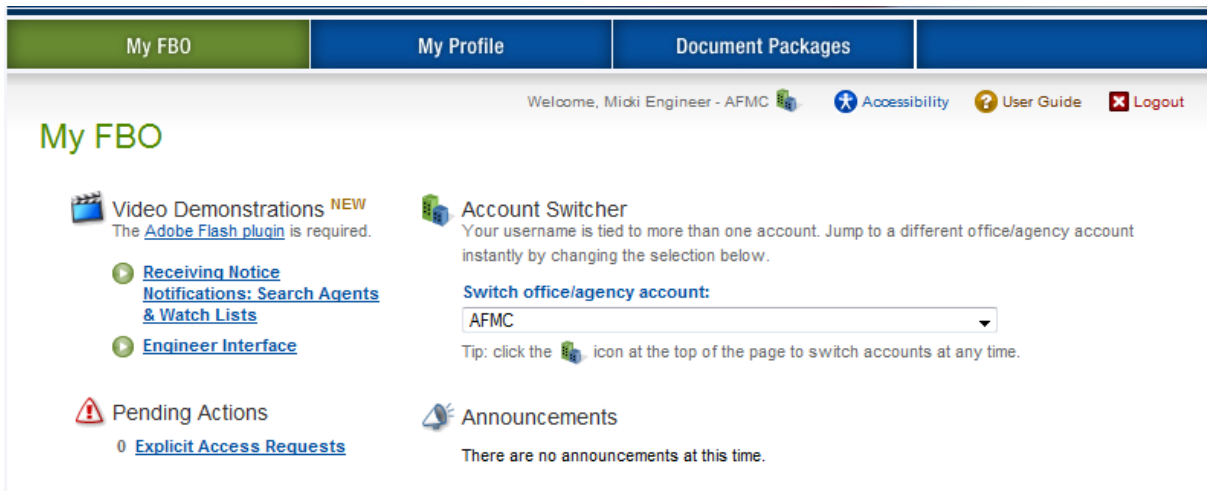
The screenshot displays the 'My FBO' page on the FedBizOpps.gov website. At the top, there is a blue header with the FedBizOpps.gov logo and the text 'Federal Business Opportunities'. Below the header is a navigation bar with tabs for 'My FBO', 'My Profile', and 'Document Packages'. The main content area is titled 'My FBO' and includes a welcome message for 'Micki Engineer - AFMC'. There are several utility links: 'Accessibility', 'User Guide', and 'Logout'. The page is divided into four main sections:

- Video Demonstrations**: A section with a 'NEW' badge, stating that the Adobe Flash plugin is required. It contains three links: 'Receiving Notice', 'Notifications: Search Agents & Watch Lists', and 'Engineer Interface'.
- Account Switcher**: A section for users with multiple accounts. It explains that the username is tied to more than one account and provides a dropdown menu to switch the office/agency account. The current selection is 'AFMC'. A tip indicates that users can click the user icon at the top of the page to switch accounts at any time.
- Pending Actions**: A section with a warning icon and a count of '0 Explicit Access Requests'.
- Announcements**: A section with a speaker icon and the message 'There are no announcements at this time.'

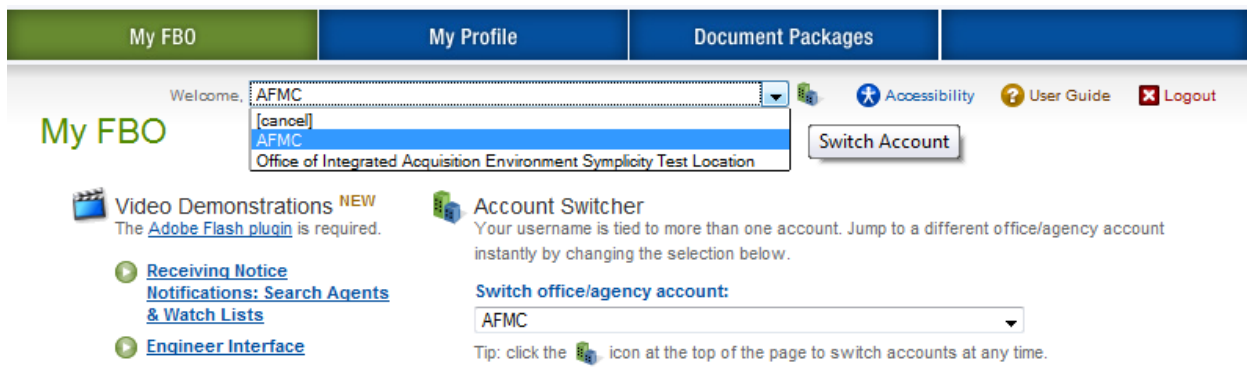
 At the bottom of the page, there is a notice about Section 508 Compliance and links to 'User Guide', 'For Help: Federal Service Desk', and 'Accessibility'.

3.2.2 Multi-account Users

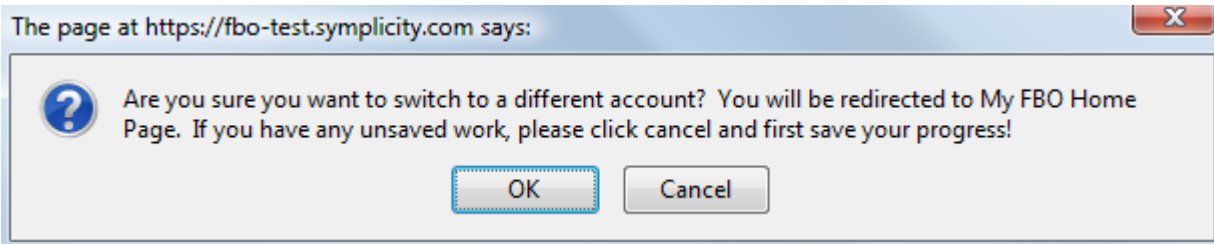
- I. All users will have one username. A username can be associated with several accounts. From an account, a user is designated as an engineer for a particular agency or office. Because some engineers are associated with multiple agencies/offices, they will have multiple accounts tied to their username. Users having multiple associations can switch between accounts by using the switch account tool at the top of the page, OR on their My FBO page. The switch account option will appear on the top of all pages of navigation. If the username is not associated with multiple accounts, this link will not be available.
- II. When a user logs into the system, they will see welcome, user name / agency of the account they are currently managing.



- III. If the switch account icon is clicked, the user will have a chance to switch to another account.
- IV. A user can also use the Account Switcher section on the My FBO page to switch accounts. Simply click on the drop-down arrow and select the desired account.



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



3.2.3 My Profile

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

The screenshot displays the 'My Profile' page on the FEDBIZOPPS.GOV website. The header includes the site logo and navigation tabs for 'My FBO', 'My Profile', and 'Document Packages'. The user is logged in as 'Engineer - ADMINISTRATIVE OFFICE OF THE U.S. COURTS (test)'. The main content area is titled 'Engineer: Contact Info' and features two sub-tabs: 'Contact Information' (selected) and 'Account'. Under 'Contact Information', there are 'Edit' and 'Return' buttons. The 'Agency User Information' section lists: Fullname: Engineer, First Name: Engineer, Last Name: Engineer, and Email: test@engineer.com. A separate 'AGENCY INFORMATION' box on the right shows: Agency: ADMINISTRATIVE OFFICE OF THE U.S. COURTS, Office: Top Level, Location: test, and Role(s): Engineer. Footer links include User Guide, Help Desk, and Accessibility.

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

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Federal Business Opportunities

My FBO
My Profile
Document Packages

Welcome, Engineer - ADMINISTRATIVE OFFICE OF THE U.S. COURTS (test) [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

Engineer: Contact Info

RETURN

Contact Information

Account

Save

Return

* indicates a required field

Agency User Information

[Edit your personal information](#)

Title:

Fullname*:

First Name:

Middle Name:

Last Name:

Suffix:

Email*:

Phone:

Cell Phone:

Fax:

Save

Return

AGENCY INFORMATION

Agency ADMINISTRATIVE OFFICE OF THE U.S. COURTS

Office Top Level

Location: test

Role(s): Engineer

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

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

FEDBIZOPPS.GOV Federal Business Opportunities

My FBO My Profile Document Packages

Welcome, nancy engineer only - AGENCY FOR INTERNATIONAL DEVELOPMENT [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

nancy engineer only: Account

[RETURN](#)

Contact Information Account

Save Return * indicates a required field

Account Information

Username*: Used to login
nancyengineeronly

Enter New Password:

Verify Password:

Save Return

[User Guide](#) [Accessibility](#) [Help Desk](#) 877-472-3779 (Toll Free) fbo.support@gsa.gov

3.2.4 Document Packages

- I. There are three sub-tabs on the user's Document Packages page. The technical documents sub-tab presents the list of active document packages associated with their agency/office location.
- II. The Archived tab lists all archived document packages associated with their agency/office location.
- III. The authorized parties tab has three sub tabs which enumerate, authorized vendors, pending request for authorization, and rejected requests for authorization.
- IV. The keyword search allows a user to conduct a full word search of the document title.
- V. Click the more search fields to open up additional search filters (less search fields hides the additional search filters).

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

Controlled Unclassified Document Packages/Links

[RETURN TO MY FBO](#)

Technical Documents | Archived | Authorized Parties

Keywords: [More Search Fields](#) Open the Authorized Parties tab.

Items 1-9 of 9

PR # ▼	Solicitation ▼	Created on ▼	Released/Posted ▼
12345678912 test	[Unassigned]	Jul 30, 2010 4:37 pm	Jul 30, 2010
billtest bill test	[Unassigned]	Feb 02, 2010 9:56 am	Feb 02, 2010

Federal Business Opportunities

IAE E-GOV USA.gov

Welcome, nancy engineer only - test [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

Sensitive, Unclassified Document Packages/Links

[RETURN TO HOME](#)

Technical Documents | Authorized Parties

Keywords:

Released Date: [Select](#) [Clear](#) to [Select](#) [Clear](#)

Released: yes no

4 Document Packages

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

4.1 Create New Document

- I. To add a new document package, go to main navigation document packages, and select add new package.

The screenshot shows the 'Sensitive, Unclassified Document Packages/Links' page on the FEDBIZOPPS.GOV website. The page features a navigation bar with 'My FBO', 'My Profile', and 'Document Packages'. Below the navigation bar, there are search filters for keywords, released date, and released status. A table displays three document packages with columns for PR #, Solicitation, Created on, and Released/Posted. The packages listed are 5485798, adsf132, and prnewtest.

PR #	Solicitation	Created on	Released/Posted
5485798 zip w/ exp	[Unassigned]	Mar 05, 2008 6:23 pm	Mar 05, 2008
adsf132 zip w/ export control	[Unassigned]	Mar 05, 2008 6:24 pm	Mar 05, 2008
prnewtest testup	estatate	Mar 25, 2008 5:28 pm	Mar 25, 2008

- I. The user is then prompted to complete a series of steps, to add the new package.
- II. The first step establishes the details of the package.
- III. The required fields must be completed before the user can use the save as draft resource. If save as draft is used, the document package will appear on the user's document package list.
- IV. Quit Process and Return returns the user to the previous navigation.
- V. Proceed takes the user to the next step in the process.

1 Details

▼

2 Upload Files

▼

3 Review/Submit

Package Details * indicates a required field

Please enter the details for this document package

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

Label*:

PR # / Unique Identifier*:
Must be at least 5 characters

Project #:

NSN / MMAC:

Part Number #:

Nomenclature:

Is this Export Controlled*:

yes no

Explicit Access*:

yes no

Is CD Available:

yes no

Save Draft

Quit Process And Return

Proceed

- I. At step two, the user uploads the files. The user is able to use the browse tool to find the files for upload.
- II. The user can upload zipped files. Indicate a zip file by checking the box.
- III. File description is required.
- IV. A user can use remove to remove a file.
- V. Add Another File To This Package allows the user to add another file to the package.
- VI. If save as draft is used, the user saves their work. The draft document can then be found on their document package list with a x indicating the package is not released.
- VII. Go Back takes the user back to step one.
- VIII. Quit Process and Return does not save work, and returns the user to the previous navigation.
- IX. Proceed & Review takes the user to the final step in the package creation process.
- X. **Note** - There are some practical limits on file size. Users may have problems with files larger than ~100mb, due to problems with HTTP uploads.

FEDBIZOPPS.GOV Federal Business Opportunities

My FBO My Profile Document Packages

Welcome, nancy engineer only - test [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

[New Documents/Links]

1 Details

2 Upload Files

3 Review/Submit

Files / Attachments * indicates a required field

File #1

File*

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

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

- I. At step three, the user has a chance to review the submitted materials.
- II. Go Back takes the user back to step one.
- III. If save as draft is used, the user saves their work. The draft document can then be found on their document package list with a x indicating the package is not released.
- IV. Quit Process and Return does not save work, and returns the user to the previous navigation.
- V. Release Package, releases the package for use by buyers.

The screenshot shows the 'New Documents/Links' page on the FEDBIZOPPS.GOV website. The page has a blue header with the site logo and navigation tabs for 'My FBO', 'My Profile', and 'Document Packages'. A user is logged in as 'nancy engineer only'. The main content area includes a sidebar with steps: 1. Details, 2. Upload Files, and 3. Review/Submit. A yellow warning box states: 'Note: This package is not tied to a solicitation. Please click [release] now to make it available for solicitation attachments.' Below this is the 'Package Details' section with the following information:

- Contracting Office Location: test
- Label: nancyengineeronly
- PR #: test2328
- Is this Export Controlled?: yes
- Explicit Access: yes
- Is CD Available: no

The 'Files / Attachments' section shows a file named 'uh_pic.bmp' (1,727.54 Kb) with the description 'test'. At the bottom, there are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Release Package'.

4.2 Delete Document Package

- I. Note, if a package has been posted to a solicitation, the engineer will not be able to delete the package.
- II. To delete a document package, go to main navigation document packages, and select the package link for the package to be deleted. This opens the details of the package.

FEDBIZOPPS.GOV Federal Business Opportunities

Welcome, nancy engineer only - test [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

Sensitive, Unclassified Document Packages/Links

[RETURN](#)

Technical Documents [Authorized Parties](#)

Keywords: [Less](#)

Released Date: [Select](#) [Clear](#) to [Select](#) [Clear](#)

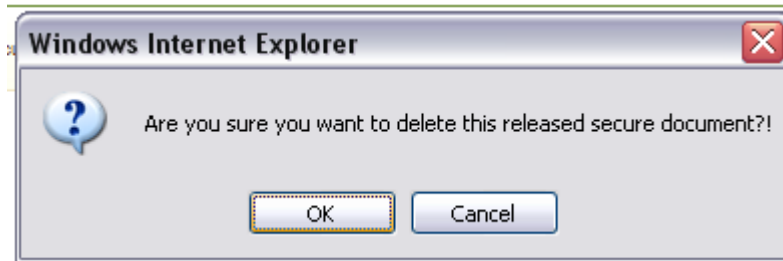
Released: yes no

[Go](#)

Items 1-5 of 5

PR # ▼	Solicitation ▼	Created on ▼	Released/Posted ▲
test328 test	[Unassigned]	Mar 29, 2008 8:24 pm	Mar 29, 2008
prnewtest testup	estatate	Mar 25, 2008 5:26 pm	Mar 25, 2008
5485798 zip w/ exp	[Unassigned]	Mar 05, 2008 8:23 pm	Mar 05, 2008
adsf132	[Unassigned]	Mar 05, 2008 8:24 pm	Mar 05, 2008

- I. Once the package is open, select delete to delete the package.
- II. Users will be asked to confirm their request, because the action is immediate and non-reversible. Select ok to confirm.



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Federal Business Opportunities

My FBO
My Profile
Document Packages

Welcome, nancy engineer only - test [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

test
[RETURN](#) | [RETURN TO LIST \(DOCUMENT_PACKAGE\)](#)

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

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

[Return](#) [Delete](#) [Edit](#)

Contracting Office Location:	test
Is this a secure/sensitive package?:	yes
Label:	test
PR #:	test328
Project #:	34333
NSN / MMAC:	asdfs
Part Number #:	88899
Nomenclature:	widget
Is this Export Controlled?:	no
Explicit Access:	yes
Is CD Available:	no

[uh pic.bmp \(1,727.54 Kb\)](#)
 Description: test

[Return](#) [Delete](#) [Edit](#)

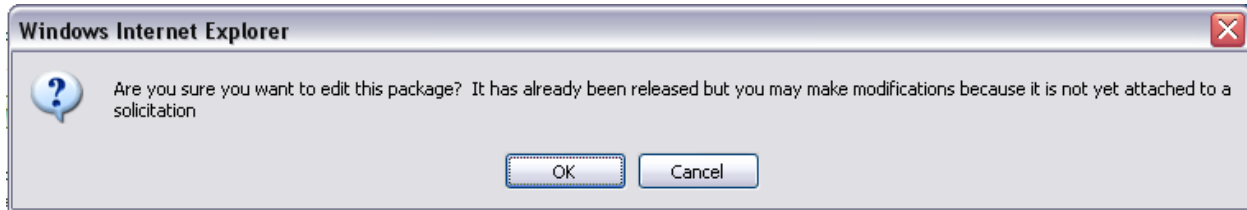
4.3 Edit Document Package

- I. Note, if a package has been posted to a solicitation, the engineer will not be able to edit the package.
- II. To edit a document package, go to main navigation document packages, and select the package link for the package to be edited. This opens the details of the package.

The screenshot shows the 'Document Packages' section of the FEDBIZOPPS.GOV website. The page title is 'Sensitive, Unclassified Document Packages/Links'. There are two tabs: 'Technical Documents' (selected) and 'Authorized Parties'. Below the tabs, there are search filters: 'Keywords:' with a text input and a 'Less' link; 'Released Date:' with two date pickers and 'Select' and 'Clear' buttons; and 'Released:' with radio buttons for 'yes' and 'no'. A 'Go' button is located below the filters. Below the filters, it says 'Items 1-5 of 5'. A table displays the following data:

PR # ▼	Solicitation ▼	Created on ▼	Released/Posted ▲
test1328 test	[Unassigned]	Mar 29, 2008 6:24 pm	Mar 29, 2008
prnewtest testup	estate	Mar 25, 2008 6:28 pm	Mar 25, 2008
5485798 zip w/ exp	[Unassigned]	Mar 05, 2008 6:23 pm	Mar 05, 2008
adsf132	[Unassigned]	Mar 05, 2008 6:24 pm	Mar 05, 2008


- I. Once the package is open, select edit to make changes to the package.
- II. Users will be asked to confirm their request, because the. Select ok to confirm.
- III. Users will be taken to step one of document creation and can progress as if the document had been previously saved as draft. See above for details on notice creation.

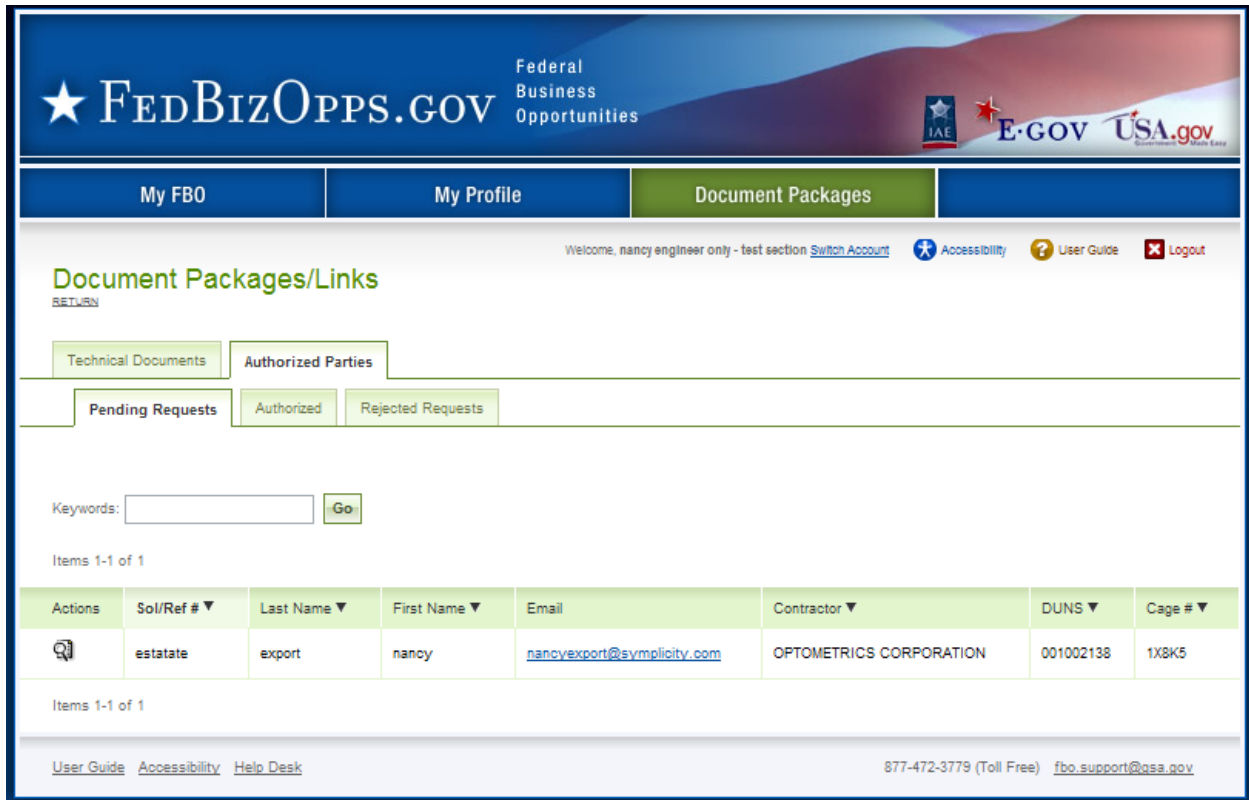


5 Manage Explicit Access Requests


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



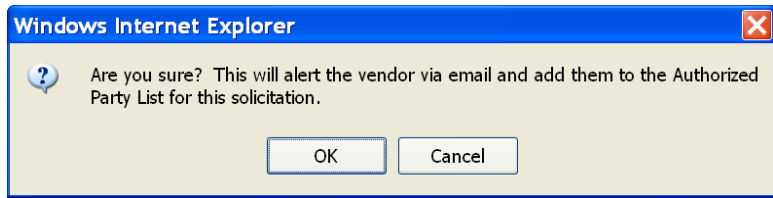
- I. The authorized parties list is divided into three sub-tabs: pending requests, authorized, and rejected requests.
- II. To review a pending request, click on the review icon  for the request record.



The screenshot shows the FEDBIZOPPS.GOV website interface. At the top, there is a navigation bar with 'My FBO', 'My Profile', and 'Document Packages' tabs. Below this is a header area with the site logo and 'Federal Business Opportunities' text. A secondary navigation bar contains links for 'Welcome, nancy engineer only - test section', 'Switch Account', 'Accessibility', 'User Guide', and 'Logout'. The main content area is titled 'Document Packages/Links' and features a sub-navigation bar with 'Technical Documents', 'Authorized Parties', and 'Pending Requests' tabs. Under 'Pending Requests', there are further sub-tabs for 'Authorized' and 'Rejected Requests'. A search bar with a 'Go' button is present. Below the search bar, it indicates 'Items 1-1 of 1'. A table displays the search results with columns for Actions, Sol/Ref #, Last Name, First Name, Email, Contractor, DUNS, and Cage #. The table contains one row with the following data: Actions (review icon), Sol/Ref # (estateate), Last Name (export), First Name (nancy), Email (nancyexport@symplcity.com), Contractor (OPTOMETRICS CORPORATION), DUNS (001002138), and Cage # (1X8K5). Below the table, it again indicates 'Items 1-1 of 1'. At the bottom of the page, there are links for 'User Guide', 'Accessibility', and 'Help Desk', along with contact information: '877-472-3779 (Toll Free)' and 'fbo.support@gsa.gov'.

Actions	Sol/Ref # ▼	Last Name ▼	First Name ▼	Email	Contractor ▼	DUNS ▼	Cage # ▼
	estateate	export	nancy	nancyexport@symplcity.com	OPTOMETRICS CORPORATION	001002138	1X8K5

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



Welcome, nancy engineer only - test section [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

Approve/Reject Request

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

Technical Documents

Authorized Parties

Note: You may approve or reject this vendor's request for exploit access to sensitive documents.
Note: Approving this vendor will add them to the Authorized Party List for this solicitation.

Approve

Reject

Quit Process And Return

AUTHORIZED VENDOR'S INFO

Created: March 29, 2008 7:04 pm

By: [nancy yes export](#)

Modified: March 29, 2008 7:04 pm

By: [nancy yes export](#)

Pending Explicit Access Request

Status: pending

Is the Notice on FBO: yes

Solicitation #: estateate

Vendor:

Contractor:

DUNS #: 001002138

Name: OPTOMETRICS CORPORATION

Cage #: 1X8K5

Fullname: nancy yes export

First Name: nancy

Middle Name: yes

Last Name: export

Email: nancyexport@symplicity.com

Phone: 4445558888

Approve

Reject

Quit Process And Return

- 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 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.

The screenshot shows the 'Reject Request' page for an authorized party. The page header includes the FEDBIZOPPS.GOV logo and navigation tabs for 'My FBO', 'My Profile', and 'Document Packages'. A welcome message for 'nancy engineer only' is displayed, along with links for 'Switch Account', 'Accessibility', 'User Guide', and 'Logout'. The main content area is titled 'Reject Request' and includes a 'Note: Please add a reason for rejection'. Below this, there are two buttons: 'Quit Process And Return' and 'Save And Send Rejection'. The 'Reject Authorized Party Request' section contains a form with the following fields: Status (rejected), Is the Notice on FBO (yes), Solicitation # (estate), Vendor (nancy yes export), and a 'Rejection Note*' text area. A right-hand sidebar displays 'AUTHORIZED VENDOR'S INFO' with creation and modification dates for 'nancy yes export'. A legend indicates that an asterisk (*) denotes a required field.

6 Document Audit Trail

- I. For sensitive, but 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. Audit trail does not record data if for secured links. An audit trail is only maintained if uploaded material was in the format of upload file(s).
- II. Go to main navigation Document Packages. For the document package you would like to review, click on the package link.

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

Welcome, nancy engineer only - test section [Switch Account](#) | [Accessibility](#) | [User Guide](#) | [Logout](#)

Sensitive, Unclassified Document Packages/Links

[RETURN](#)

[Technical Documents](#) | [Authorized Parties](#)

Keywords: [Less](#)
 Released Date: [Select](#) [Clear](#) to [Select](#) [Clear](#)
 Released: yes no
[Go](#)

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

PR # ▼	Solicitation ▼	Created on ▼	Released/Posted ▼
123456 More stuff	123456456	Mar 25, 2008 10:02 am	Mar 25, 2008
14785 testing	58979	Mar 25, 2008 4:02 pm	Mar 25, 2008
170381 testing second time	123456	Mar 25, 2008 4:04 pm	Mar 27, 2008

- I. When the Document package record is opened, it defaults to the details sub-tab for the record. Click on the audit trail sub-tab, to review the listing of vendor review.

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IAE E-GOV USA.gov

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

Welcome, nancy engineer only - test section [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

PR # 123456: 123456456
[RETURN](#) | [RETURN TO LIST \(DOCUMENT_PACKAGE\)](#)

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

Note: This is a sensitive, but unclassified document package. This package has been assigned to a solicitation and cannot be edited

[Return](#)

Contracting Office Location: 5
 Is this a secure/sensitive package?: yes
 Is the related solicitation on FBO: yes
 Solicitation: Jelly Beans - 123456456
 Type: Other (Draft RFPs/RFIs, Responses to Questions, etc.)
 Label: Stuff
 PR #: 123456
 Is this Export Controlled?: no
 Explicit Access: yes
 Is CD Available: no

[fbo_buyer_guide1.pdf](#) (4,587.53 Kb)
 Description: More stuff

[Return](#)

- I. 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.)
- II. Click the review icon to open the audit trail record.

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

Welcome, nancy engineer only - test section [Switch Account](#) | [Accessibility](#) | [User Guide](#) | [Logout](#)

Audit Trail - PR # 123456: 123456456

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

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

Keywords: [Go](#)

Items 1-1 of 1

Actions	Last Name	First Name	Contractor	DUNS	Filename	Created on
	wetzler	tony	Dagostin Incorporated	123456789	fbo_buyer_guide1.pdf	Mar 25, 2008 10:11 am

Items 1-1 of 1

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

Welcome, nancy engineer only - test section [Switch Account](#) [Accessibility](#) [User Guide](#) [Logout](#)

Audit Trail - PR # 123456: 123456456

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

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

[Return](#)

Secure Package Log

PR #: 123456
Sol/Ref #: 123456456
Filename: fbo buyer guide1.pdf
Vendor: Contractor:
DUNS #: 123456789
Name: Dagostin Incorporated
Doing Business As (DBA): Doing
Cage #: 12312323
Fullname: tony wetzler
Email: wetzler@symplicity.com
Phone: 5555555555
Action: download
Action Occured On: Mar 25, 2008 10:11 am
IP Address: 192.168.1.188

[Return](#)

SECURE DOCUMENT LOG INFO

Created: March 25, 2008 10:11 am
By: [tony wetzler](#)
Modified: March 25, 2008 10:11 am
By: [tony wetzler](#)