Procurement Integrated Enterprise Environment
Vendor Registration Guide

A vendor portal for solicitations was introduced as an enterprise-level service for the Department of Defense (DoD) within the Procurement Integrated Enterprise Environment (PIEE) platform. This capability allows DoD to have a more automated and secure process for capturing solicitations and their attachments and responses from industry.

There are two vendor roles (Proposal Manager, Proposal View Only) for the PIEE Solicitation Module. The Proposal Manager role is required to submit an offer to a solicitation posted in the PIEE Solicitation Module.

In this guide, you will find step by step by step instructions for new users to self-register for a PIEE user account and existing users to add additional roles. Refer to the Roles and Actions/Functions Matrix, in the help section, to assist with determining which PIEE Solicitation Module role you will need to add.

Guide Contents

Step by Step Instructions 2

New User 2

Existing User 6

Help 7

Getting Started 7

Account Support 7

Technical Support 7

Roles and Actions/Functions Matrix 7

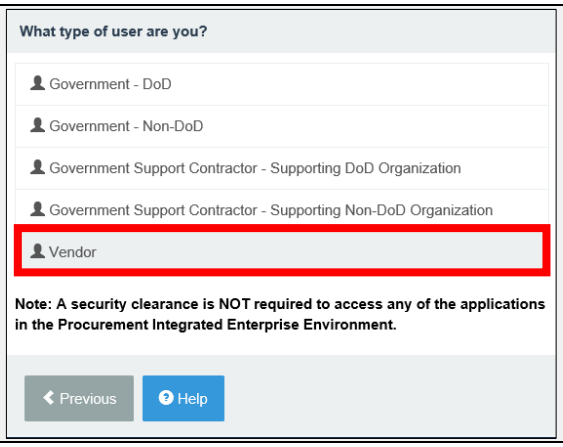
Step by Step Instructions

New User

Follow the steps to self-register for a PIEE user account if your company already has an Account Administrator.

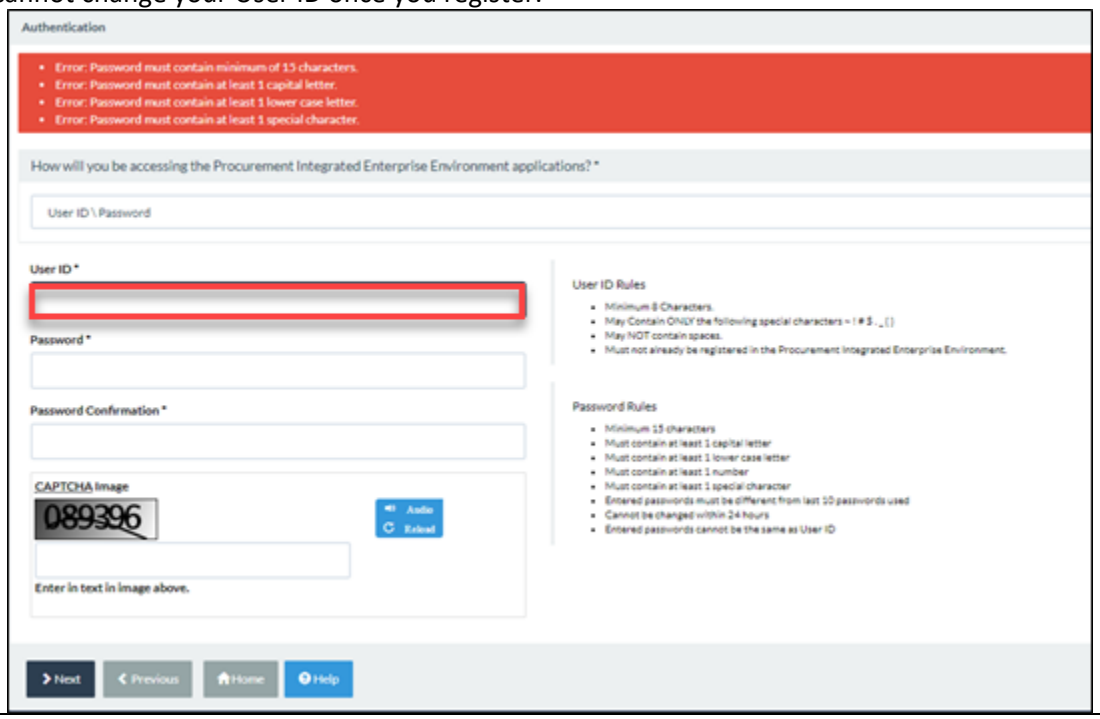
1. Click on **Register** (Top Right) from the PIEE Landing Page
https://wawf.eb.mil/

2. Select Vendor



3. Enter a User ID, Password, and CAPTCHA text. Then, select Next.

- You cannot change your User ID once you register.

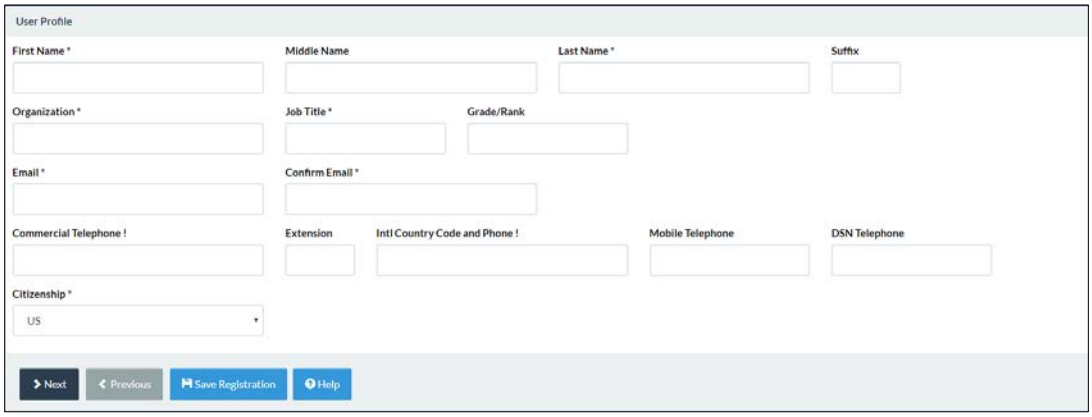


4. Create your security questions. Then, select Next.

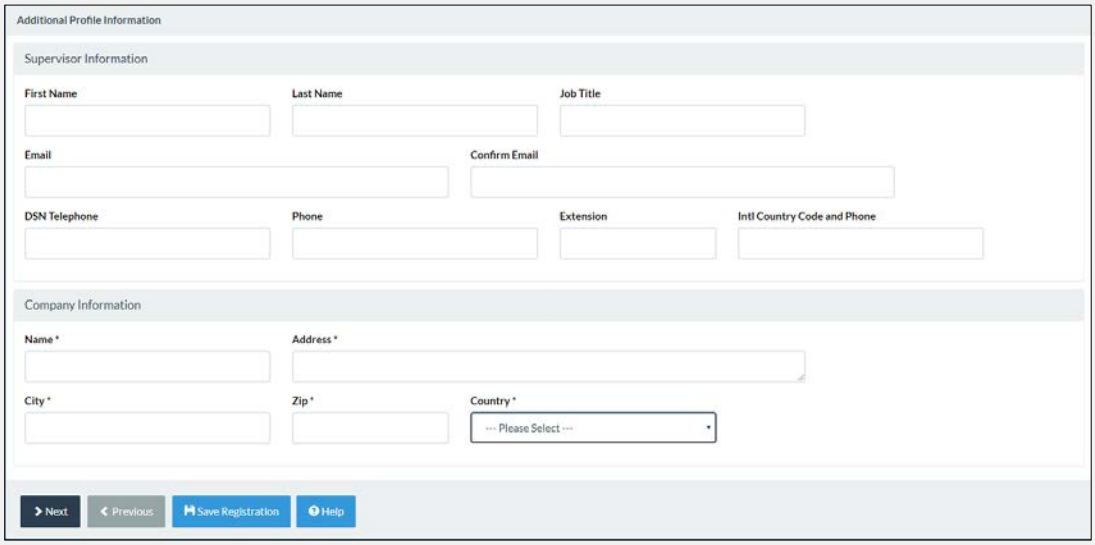
- Security Answers must be unique.

5. Complete your User Profile. Then, select Next.

- Required fields are marked with an asterisk (*).

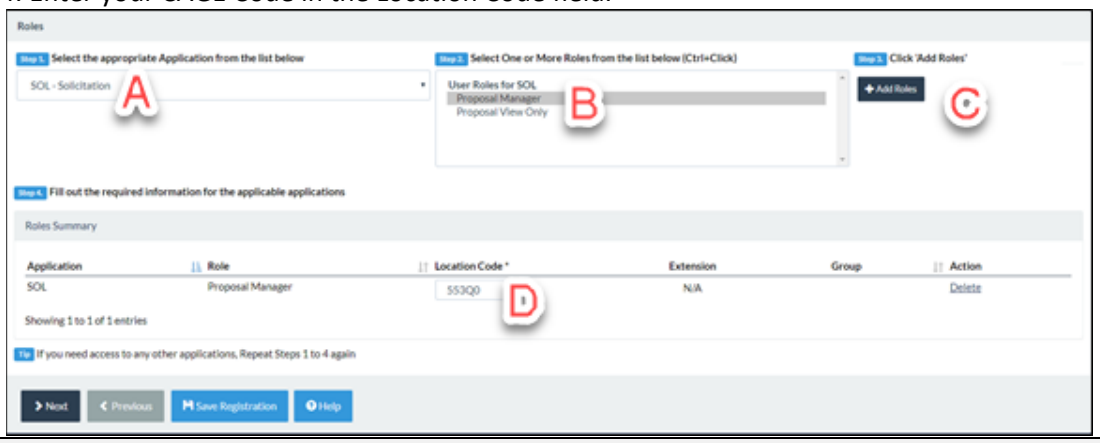


6. Complete your Supervisor and Company Information. Then, select Next.

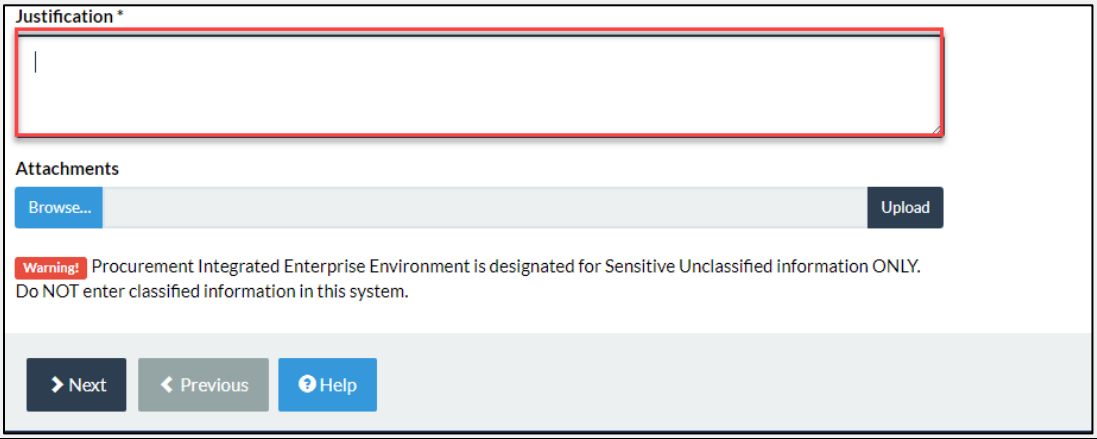


7. Complete Roles. Then, select Next.

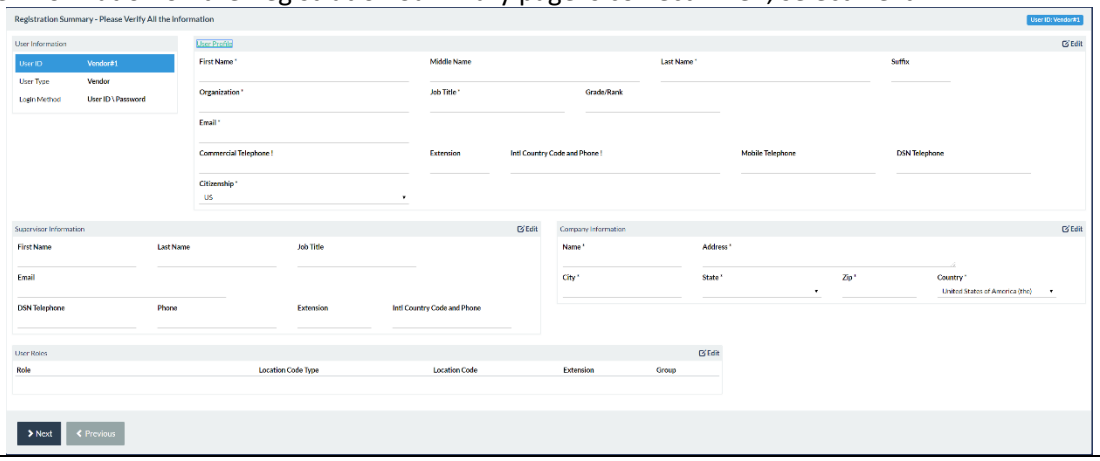
A. Step 1. Select **SOL - Solicitation** from the dropdown.
B. Step 2. Select **Proposal Manager** (or **Proposal View Only**).
C. Step 3. Click **Add Roles**.
D. Step 4. Enter your CAGE Code in the Location Code field.



8. Enter a justification for access and upload any necessary attachments. Then, select Next.

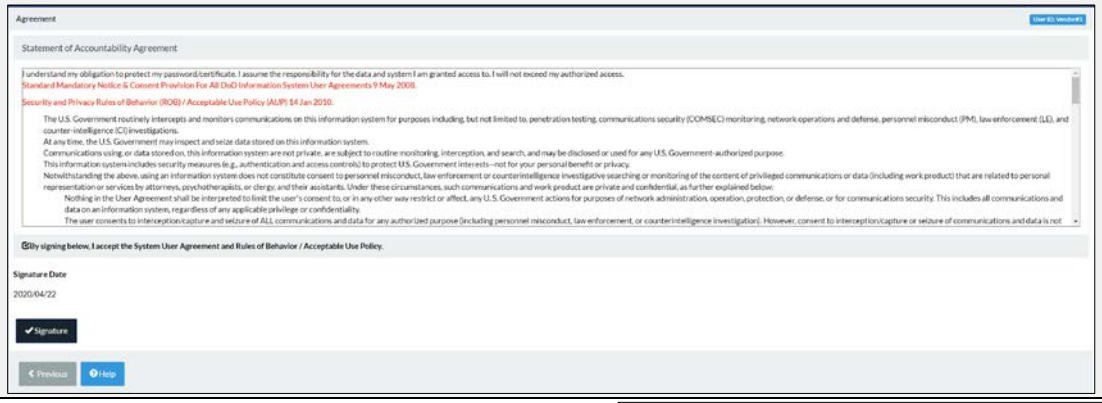


9. Verify the information on the Registration Summary page is correct. Then, select Next.

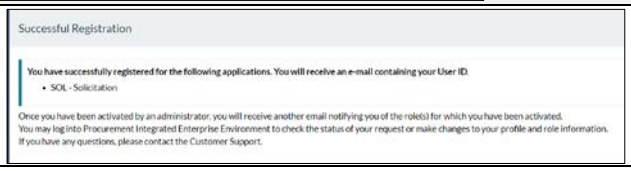


10. Review the Statement of Accountability Agreement. Then, select Signature.

- The 'Password Confirmation' modal window will appear.
- Enter password created in Step 3.
- Click Submit Registration.



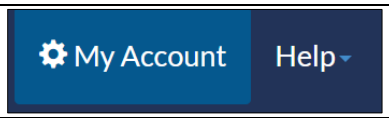
11. You will see a success message that your registration was successful. You will receive a confirmation email shortly. Once your account has been activated by an Account Administrator, you can login into PIEE.



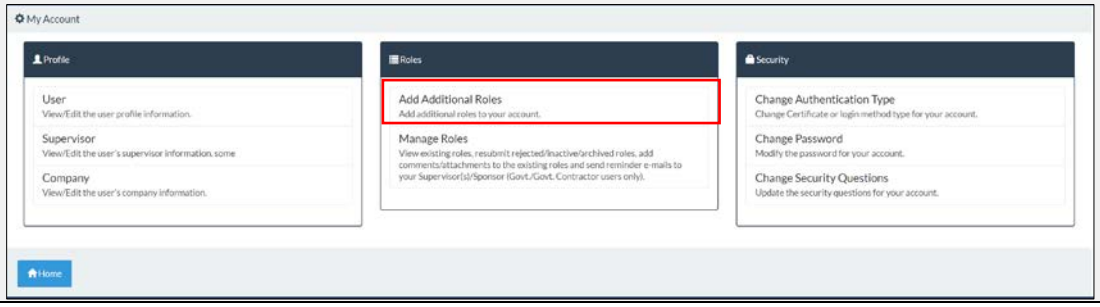
Existing User

Follow the steps to add additional roles (Proposal Manager, Proposal View Only) to your PIEE user account.

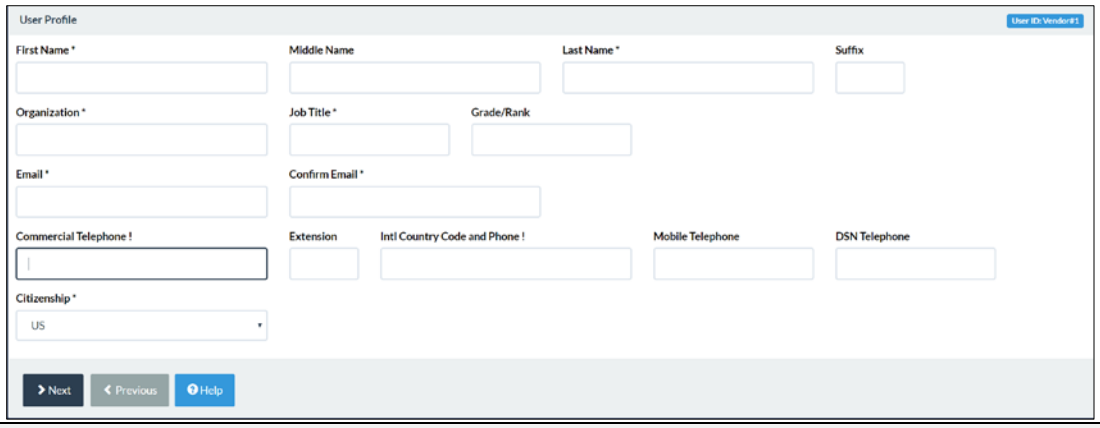
12. After logging into PIEE, click **My Account** (Top Left)



13. Select Add Additional Roles.

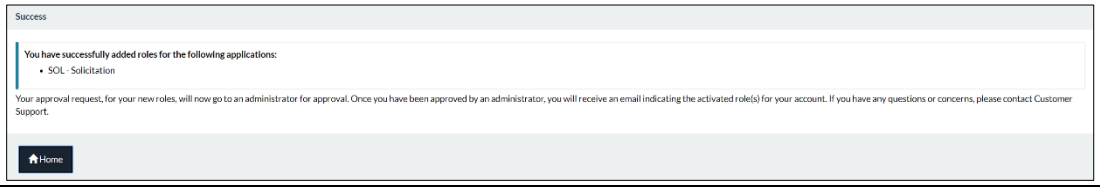


14. Verify all profile information within your account is up-to-date. Then, select Next.



15. Follow Steps 7 - 10 above.

16. You will receive a confirmation email that the new role(s) were activated by your Account Administrator.



Help

Getting Started

If your company is new to PIEE and has no Account Administrator, the link below provides the general steps in getting started as a vendor to use the PIEE Solicitation Module and other PIEE applications:

https://wawf.eb.mil/xhtml/unauth/web/homepage/vendorGettingStartedHelp.xhtml

Account Support

Your company's Account Administrator can help you view or edit profile information, reset a password or certificate. You can enter your five-character CAGE Code to find your company's Account Administrator at the link below:

https://wawf.eb.mil/xhtml/unauth/lookup/gamLookup.xhtml

Technical Support

If you are experiencing technical problems with PIEE and your company's Account Administrator cannot resolve, please contact the DISA DECC Ogden Electronic Business Service Desk or visit the link below and click "Ogden Help Desk" to submit a ticket.

https://wawf.eb.mil/xhtml/unauth/web/homepage/vendorCustomerSupport.xhtml

Email: disa.global.servicedesk.mbx.eb-ticket-requests@mail.mil
Phone: 866-618-5988, 801-605-7095

Roles and Actions/Functions Matrix

The Roles and Actions Matrix provides a depiction of the available actions for each vendor role.

Action	Role(s)
Submit Offers	▪ Proposal Manager
View Offers	▪ Proposal Manager ▪ Proposal View Only
Posts Offer Revision	▪ Proposal Manager

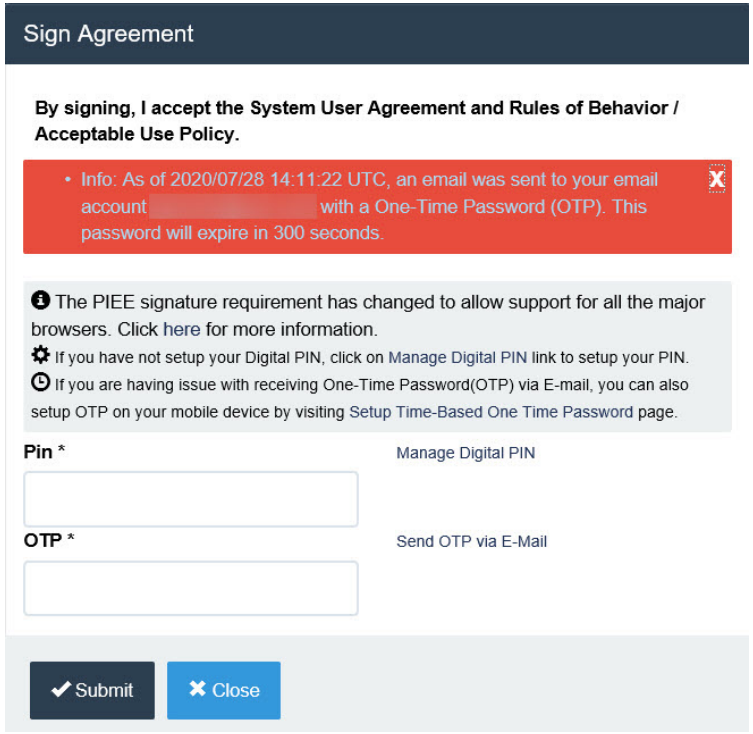
The Roles and Functions Matrix provides a depiction of the Menu Items available for each vendor role.

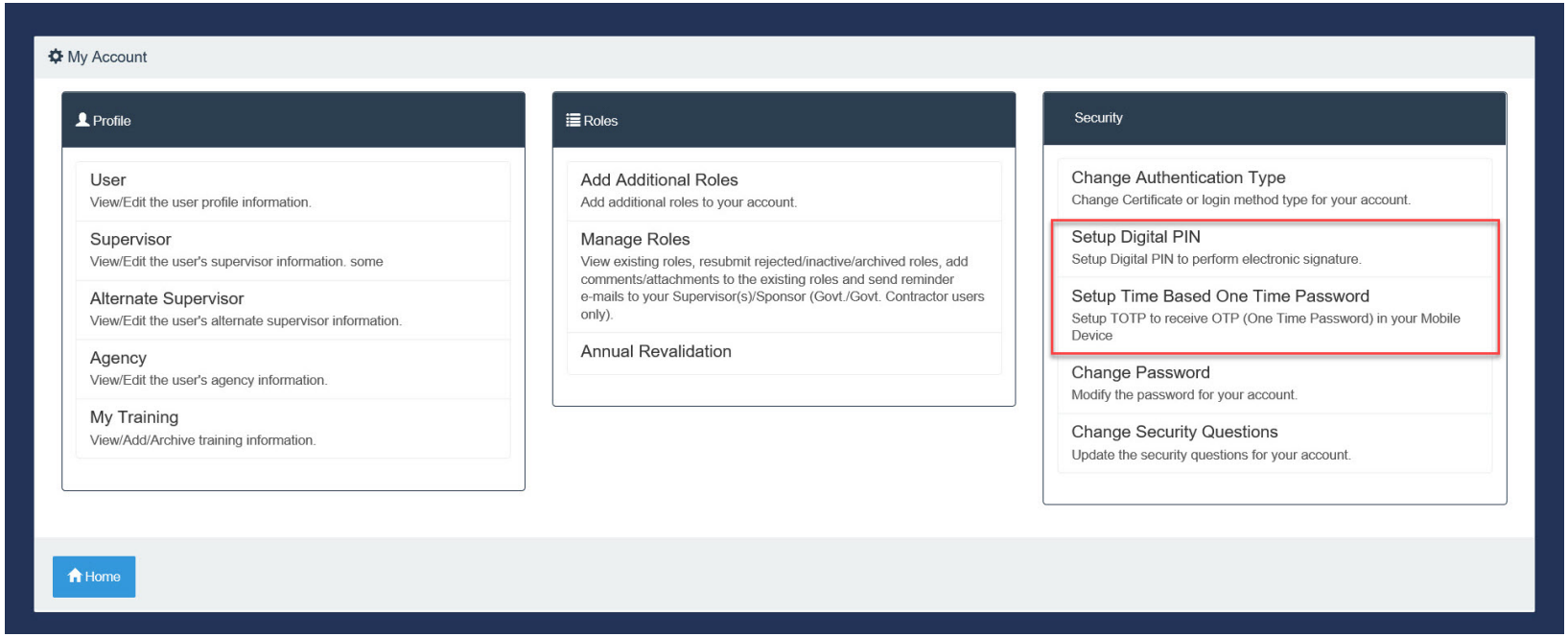
Menu Item	Role(s)
Create Unsolicited Proposal	▪ Proposal Manager
Search	▪ Proposal Manager ▪ Proposal View Only
Lookup Product/Service Codes	▪ Proposal Manager ▪ Proposal View Only
Lookup NAICS	▪ Proposal Manager ▪ Proposal View Only

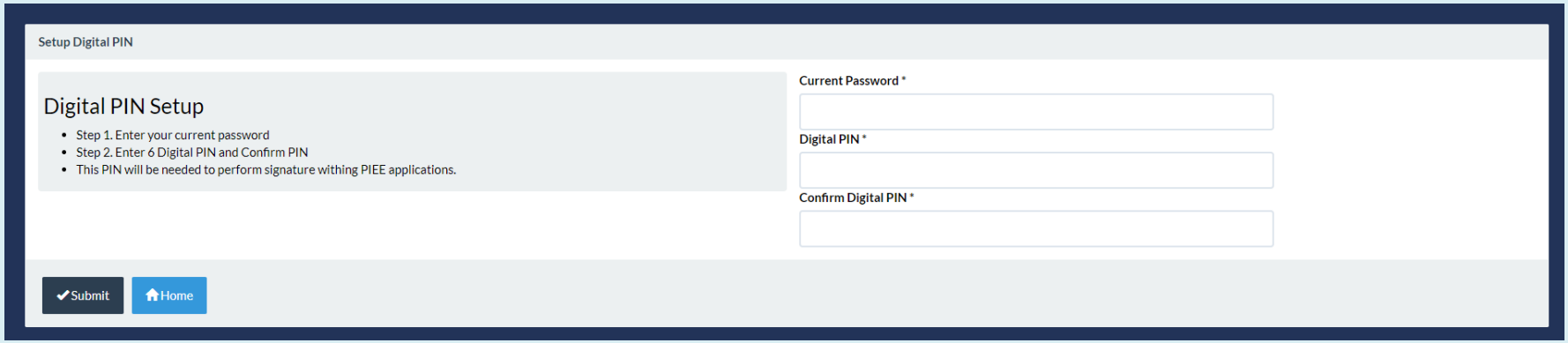
Digital PIN and Time-Based One Time Password Setup

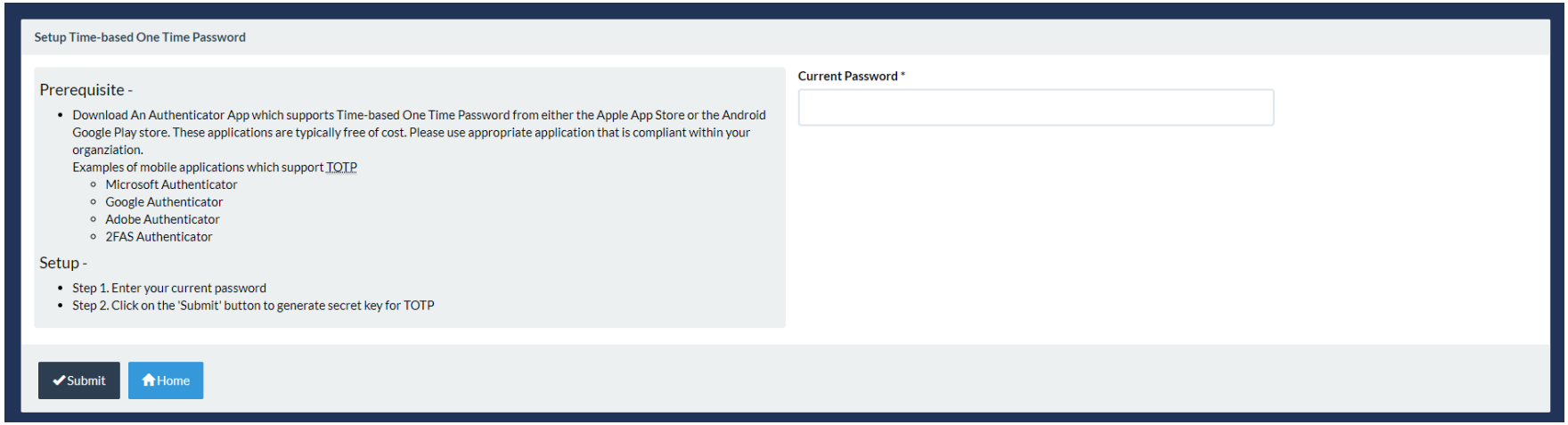
Reference Guide

PIEE Portal > My Account > Setup Digital PIN > Setup Time-Based One Time Password

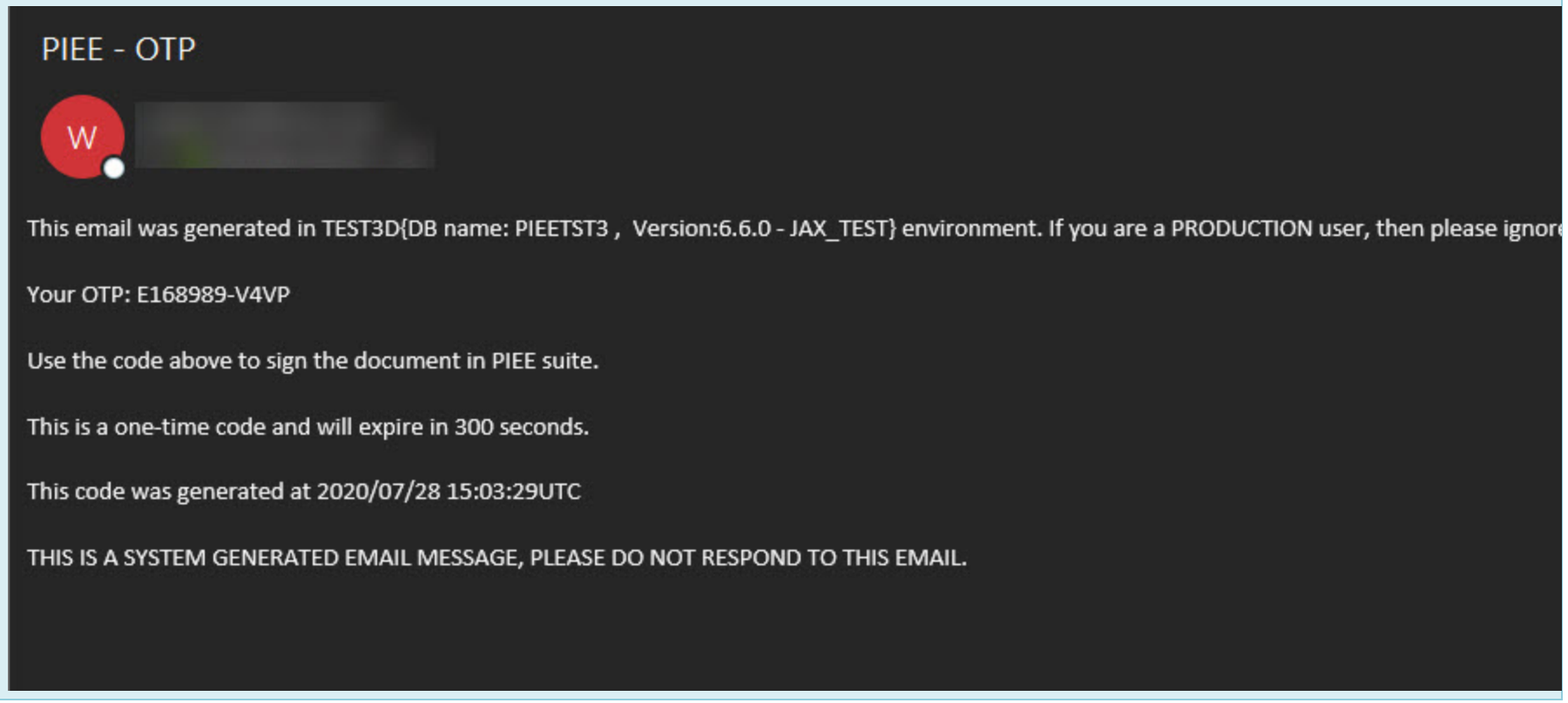
Changes to PIEE Signature Requirements	Digital Signature – User Logging in with a User ID/Password PIEE will now require users logging in with a User ID/Password to enter a PIN and a Time-Based One Time Password for all digital signatures in the PIEE application. The following will show the necessary one-time setups for this process. · Setup Digital PIN · Setup Time-based One Time Password In PIEE signing documents as a user that is logged in with a User ID and Password will now be required to enter a self-defined 6 digit pin and a One Time Password delivered via E-Mail, alternatively if the user is having issues receiving the OTP via E-Mail they may also setup a OTP on their mobile device. Instructions for both will follow.
Sample Digital Signature	

Accessing My Account	Log into PIEE with a User ID and Password user and click the My Account button at the top of the window.
My Account	The Setup Digital PIN and Setup Time Based One Time Password options will be available on the My Account screen. 
Setup Digital PIN	Select the Setup Digital PIN link, the user will be taken to a new screen where they will follow the instructions for creating a Digital PIN to be used when performing signature actions in PIEE. This is a one-time setup process. Step 1. Enter your current password Step 2. Enter a 6 Digital PIN and Confirm PIN. This PIN will be needed to perform signature within PIEE applications.

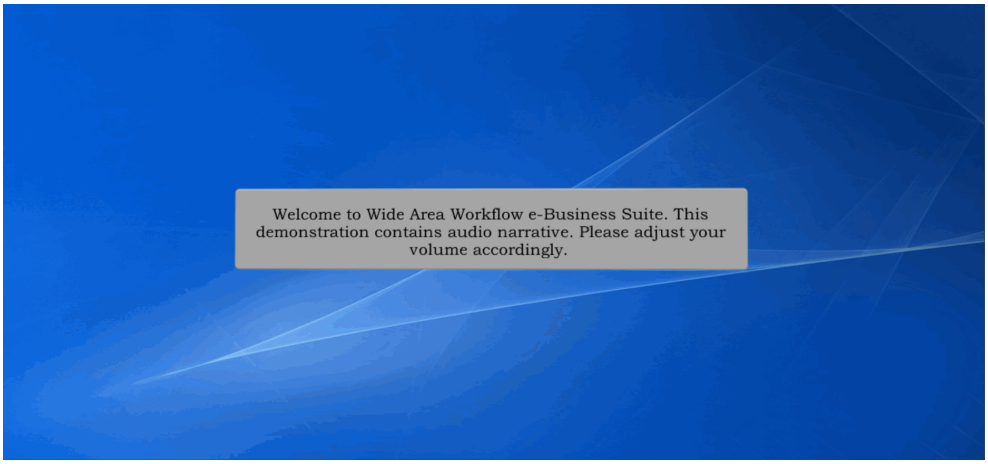
	Once the steps are completed click the Submit button to finalize the Digital PIN. 
Time-Based One Time Password (TOTP)	Users may setup a Time-based One Time Password to be used instead of the E-Mail OTP this is an optional step and the E-Mail OTP will be the default method for receiving OTPs for signing documents. Select the Setup Time Based One Time Password link, the user will be able to taken to a new screen where they will follow the instructions for setting up the Mobile App Authentication for Time-based One Time Passwords. Prerequisite – Download an Authenticator App which supports Time-based One Time Password from either the Apple App Store or the Android Google Play store. These applications are typically free of cost. Please use appropriate application that is compliant within your organization. Examples of mobile applications which support TOTP: • Microsoft Authenticator • Google Authenticator • Adobe Authenticator • 2FAS Authenticator Setup – Step 1. Enter your current password Step 2. Click on the 'Submit' button to generate secret key for TOTP Once the steps are completed click the Submit button to finalize the Time-based One Time Password.



Sample OTP E-Mail

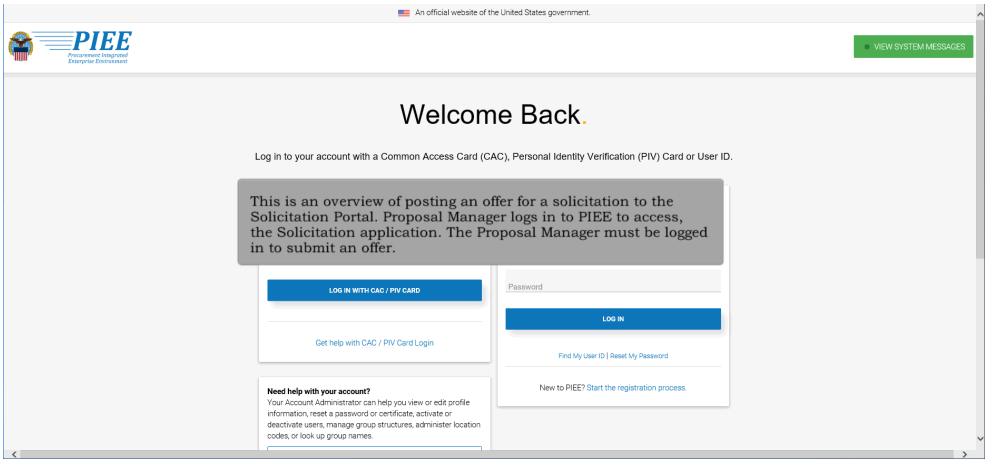


Intro



Welcome to Wide Area Workflow e-Business Suite. This demonstration contains audio narrative. Please adjust your volume accordingly.

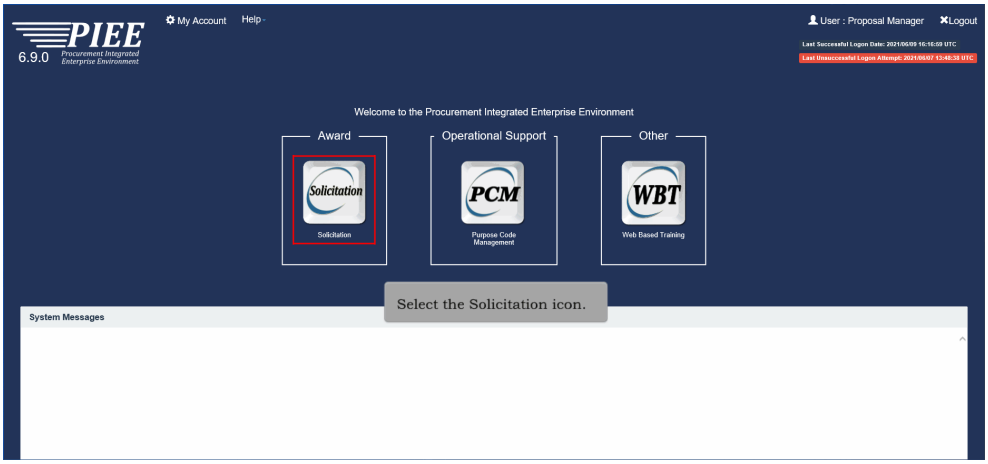
Step 1



This is an overview of posting an offer for a solicitation to the Solicitation Portal. Proposal Manager logs in to PIEE to access, the Solicitation application. The Proposal Manager must be logged in to submit an offer.

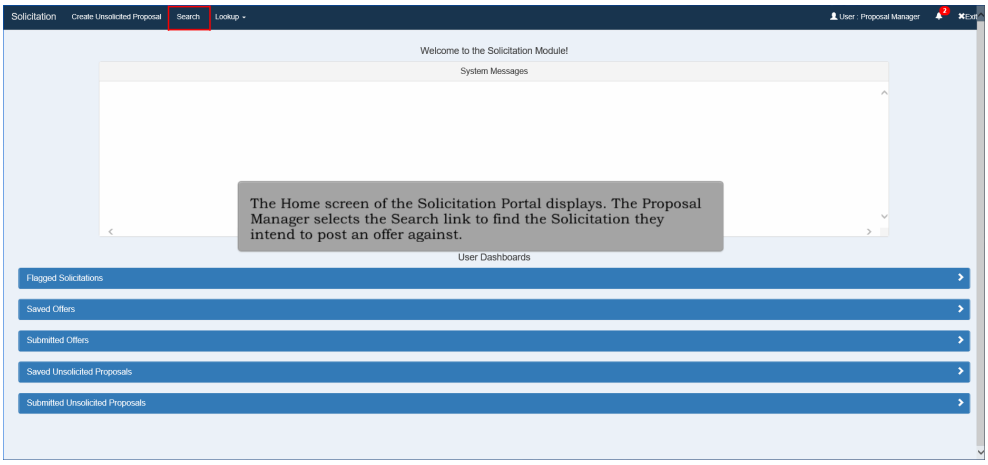
Built with Tanida Demo Builder
www.demo-builder.com

Step 2



Select the Solicitation icon.

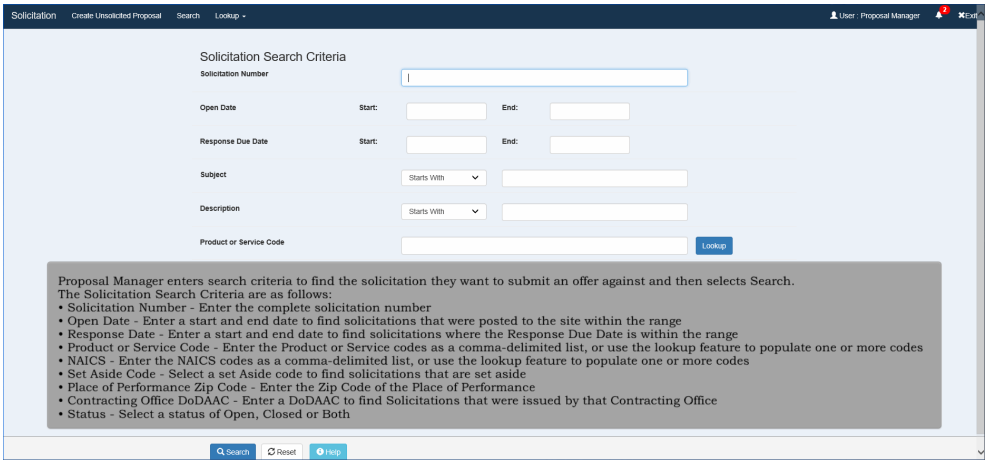
Step 3



The Home screen of the Solicitation Portal displays. The Proposal Manager selects the Search link to find the Solicitation they intend to post an offer against.

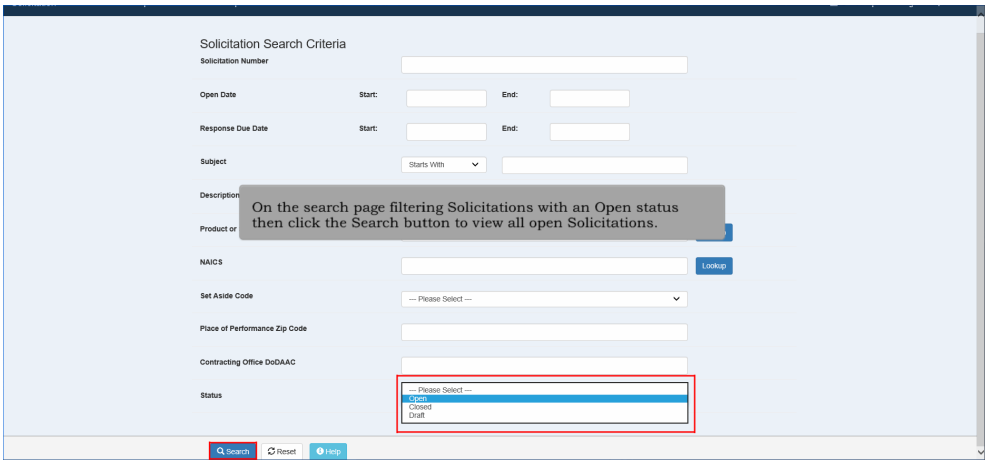
Built with Tanida Demo Builder
www.demo-builder.com

Step 4



Proposal Manager enters search criteria to find the solicitation they want to submit an offer against and then selects Search.
The Solicitation Search Criteria are as follows:
• Solicitation Number - Enter the complete solicitation number
• Open Date - Enter a start and end date to find solicitations that were posted to the site within the range
• Response Date - Enter a start and end date to find solicitations where the Response Due Date is within the range
• Product or Service Code - Enter the Product or Service codes as a comma-delimited list, or use the lookup feature to populate one or more codes
• NAICS - Enter the NAICS codes as a comma-delimited list, or use the lookup feature to populate one or more codes
• Set Aside Code - Select a set Aside code to find solicitations that are set aside
• Place of Performance Zip Code - Enter the Zip Code of the Place of Performance
• Contracting Office DoDAAC - Enter a DoDAAC to find Solicitations that were issued by that Contracting Office
• Status - Select a status of Open, Closed or Both

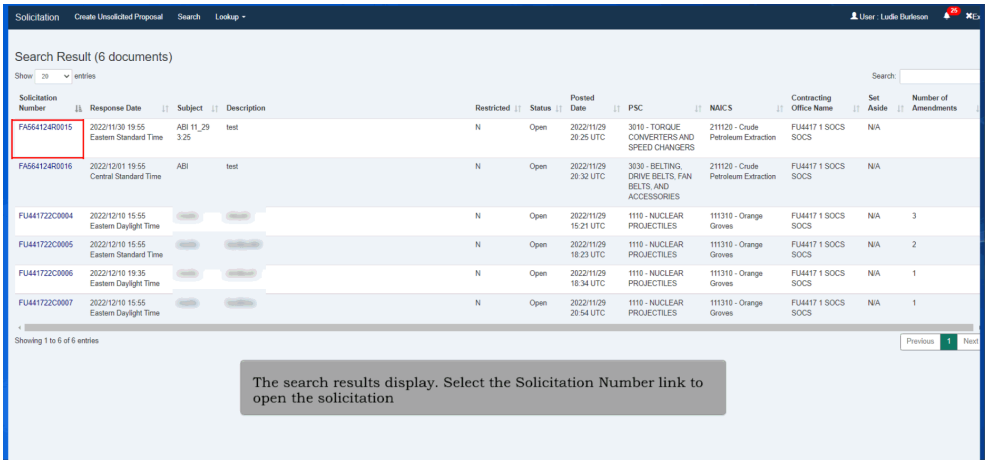
Step 5



On the search page filtering Solicitations with an Open status then click the Search button to view all open Solicitations.

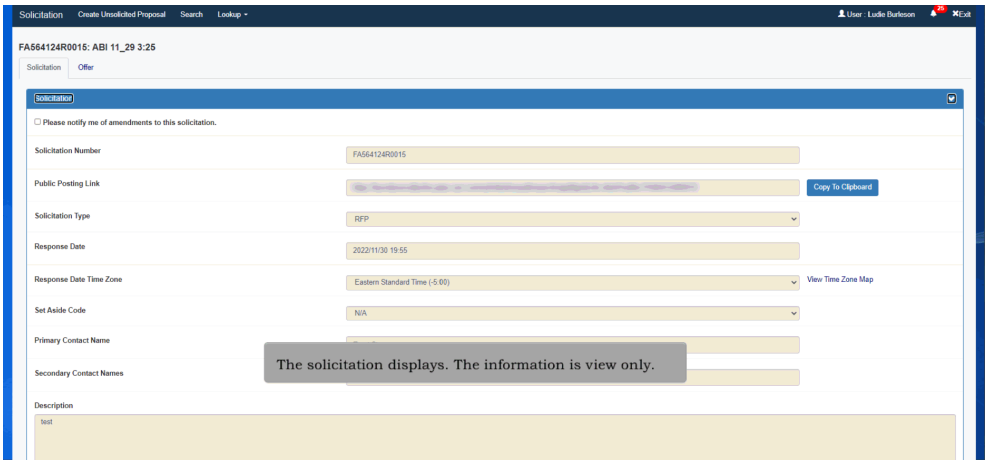
Built with Tanida Demo Builder
www.demo-builder.com

Step 6



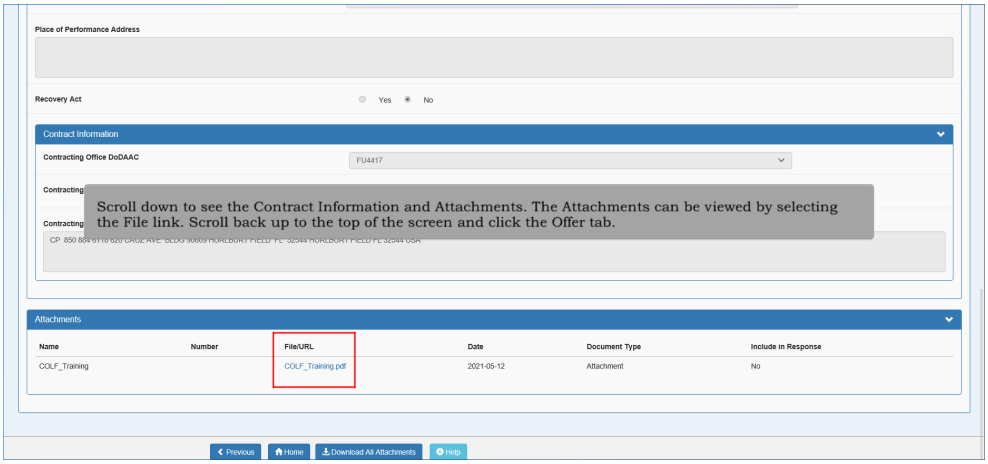
The search results display. Select the Solicitation Number link to open the solicitation

Step 7



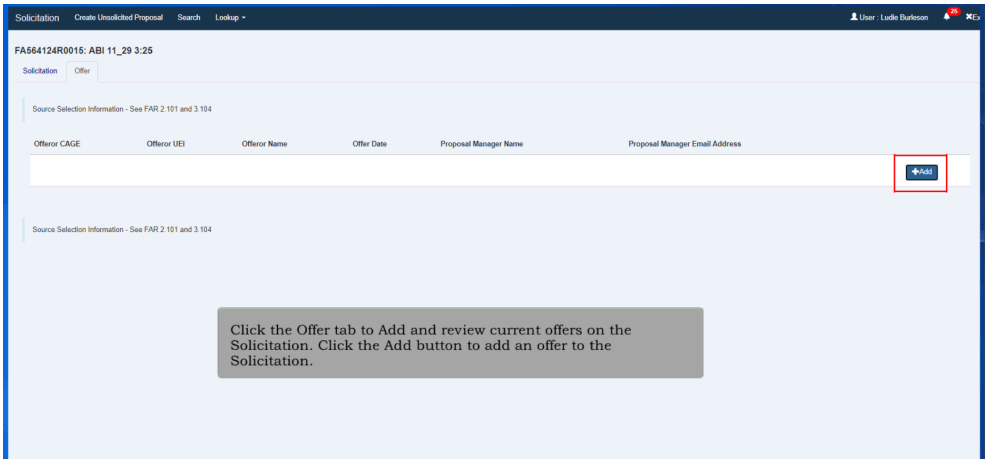
The solicitation displays. The information is view only.

Step 8



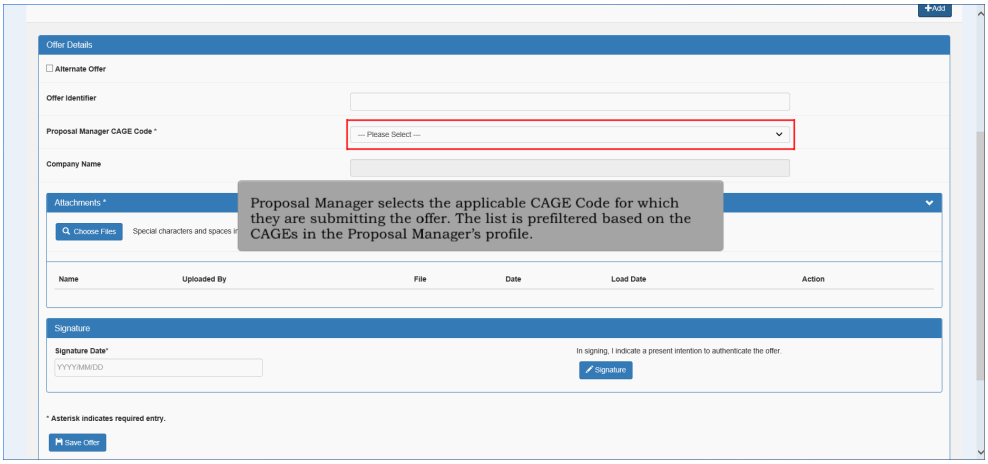
Scroll down to see the Contract Information and Attachments. The Attachments can be viewed by selecting the File link. Scroll back up to the top of the screen and click the Offer tab.

Step 9



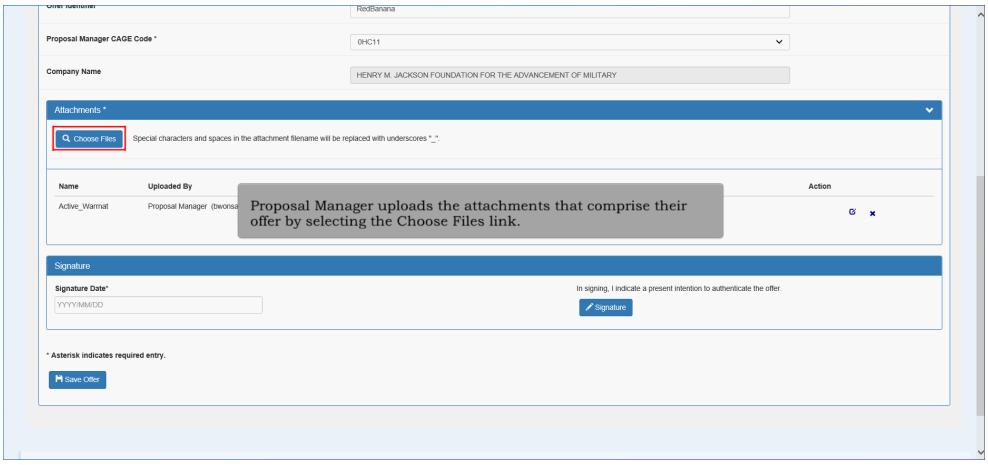
Click the Offer tab to Add and review current offers on the Solicitation. Click the Add button to add an offer to the Solicitation.

Step 10



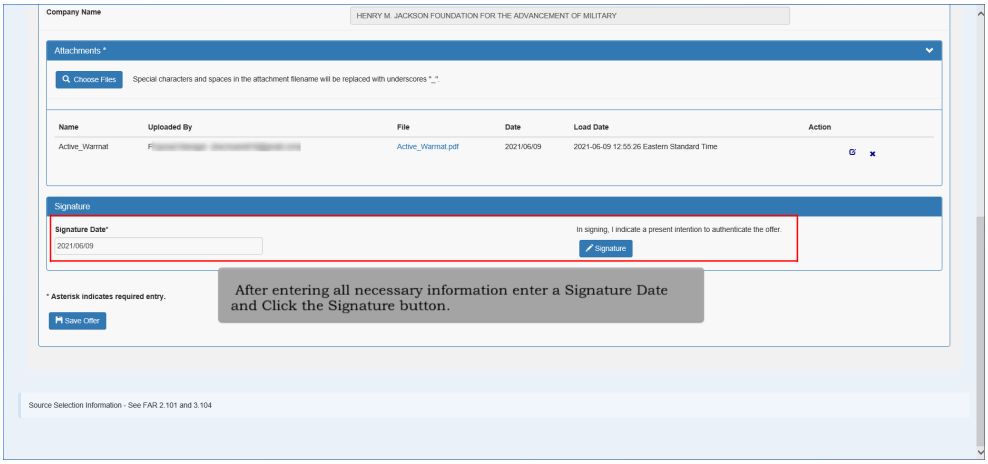
Proposal Manager selects the applicable CAGE Code for which they are submitting the offer. The list is prefiltered based on the CAGEs in the Proposal Manager's profile.

Step 11



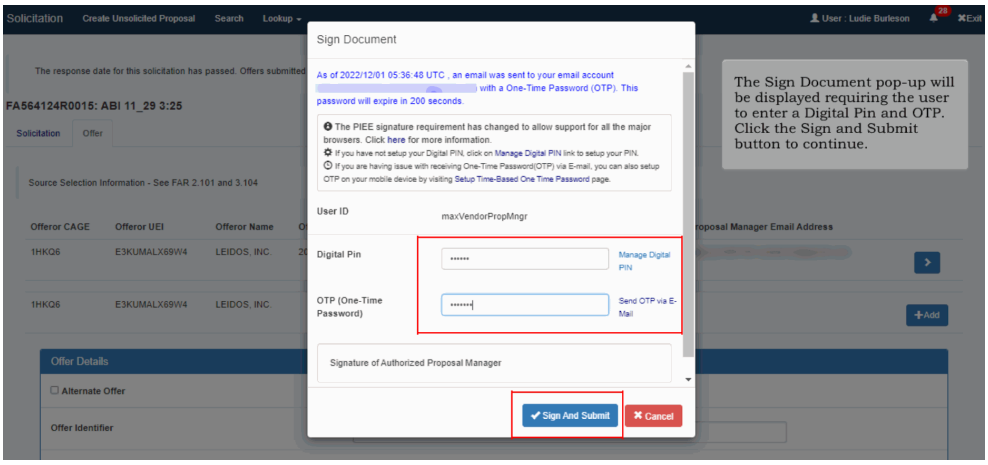
Proposal Manager uploads the attachments that comprise their offer by selecting the Choose Files link.

Step 12



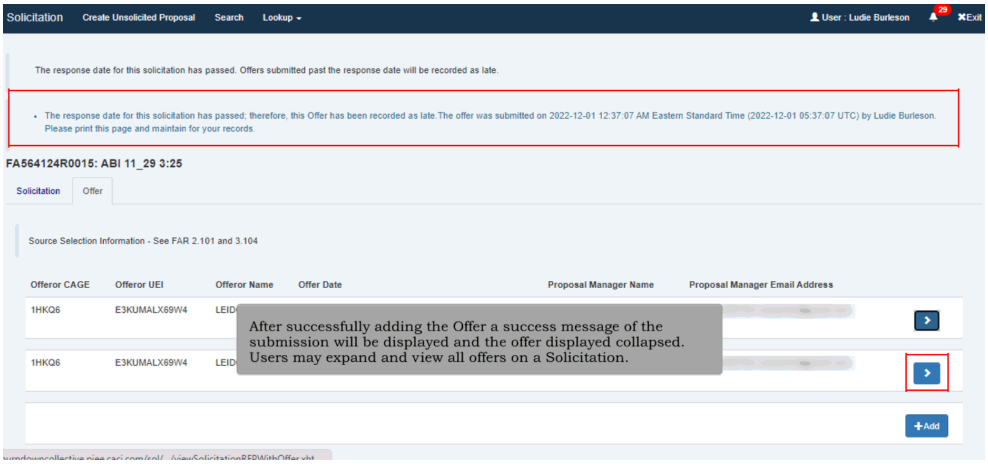
After entering all necessary information enter a Signature Date and Click the Signature button.

Step 13



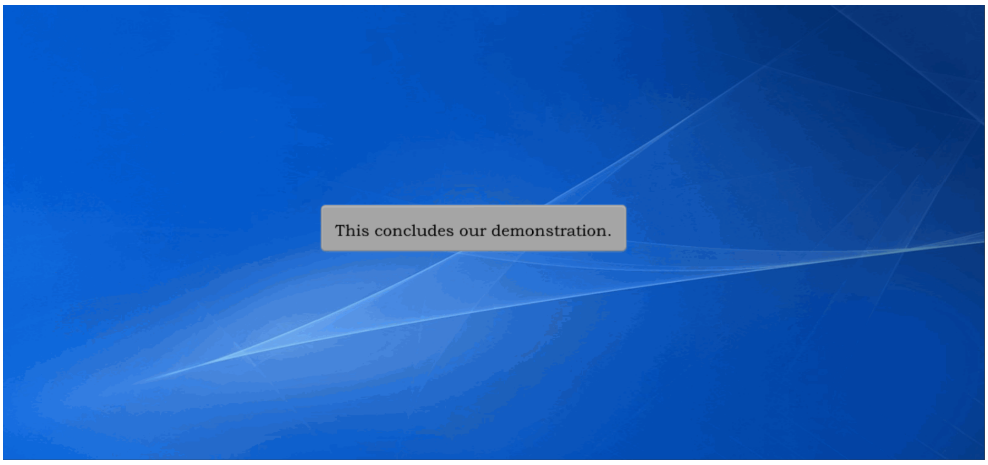
The Sign Document pop-up will be displayed requiring the user to enter a Digital Pin and OTP. Click the Sign and Submit button to continue.

Step 14



After successfully adding the Offer a success message of the submission will be displayed and the offer displayed collapsed. Users may expand and view all offers on a Solicitation.

End



This concludes our demonstration.

Built with Tanida Demo Builder
www.demo-builder.com

Proposal Manager Functions

Training Document

Homepage | Solicitation | Solicitation Homepage | User Dashboards

Table of Contents

Roles **1**

User Navigation **1**

Indicating Interest **1**

PIEE Notifications **3**

Flagged Notices **4**

Flagged Notices User Dashboard Headers: *4*

Flagged Notices User Dashboard Filter Fields: *5*

Posting Offer **6**

Offers Headers: *6*

Offer Details **6**

Attachments **7**

Material Safety Data Sheet (MSDS) 8

*Attachments * Fields:* *9*

Edit Attachment Information Pop-Up: 9

Attachment Information Pop-Up Fields: *11*

Signature **11**

Signature Fields: *12*

Sign Document Pop-Up: 12

Sign Document Pop-up Fields: *12*

Offer Submission Success **14**

Save Offer **14**

Delete Saved Offer **15**

Saved Offers **17**

Saved Offers User Dashboard Headers: *17*

Saved Offers User Dashboard Filter Fields: *17*

Submitted Offers **18**

Submitted Offers User Dashboard Headers: *18*

Submitted Offers User Dashboard Filter Fields: *18*

Posting Unsolicited Proposal **20**

Offer Details Fields: *20*

*Attachments * Fields:* *20*

Signature Fields: *21*

Agency Lookup Pop-Up: 23

Offer Details Fields: *24*

Agency Lookup Fields: *24*

Unsolicited Proposal Submission Success **25**

Saved Unsolicited Proposals **25**

Saved Unsolicited Proposals User Dashboard Headers: *25*

Saved Unsolicited Proposals User Dashboard Filter Fields: *25*

Submitted Unsolicited Proposals **26**

Submitted Unsolicited Proposals User Dashboard Headers: *26*

Submitted Unsolicited Proposals User Dashboard Filter Fields: *26*

Withdraw Offer/Unsolicited Proposal **27**

Saved Search **28**

Notice Search Criteria Fields: *32*

Search Result Fields: *32*

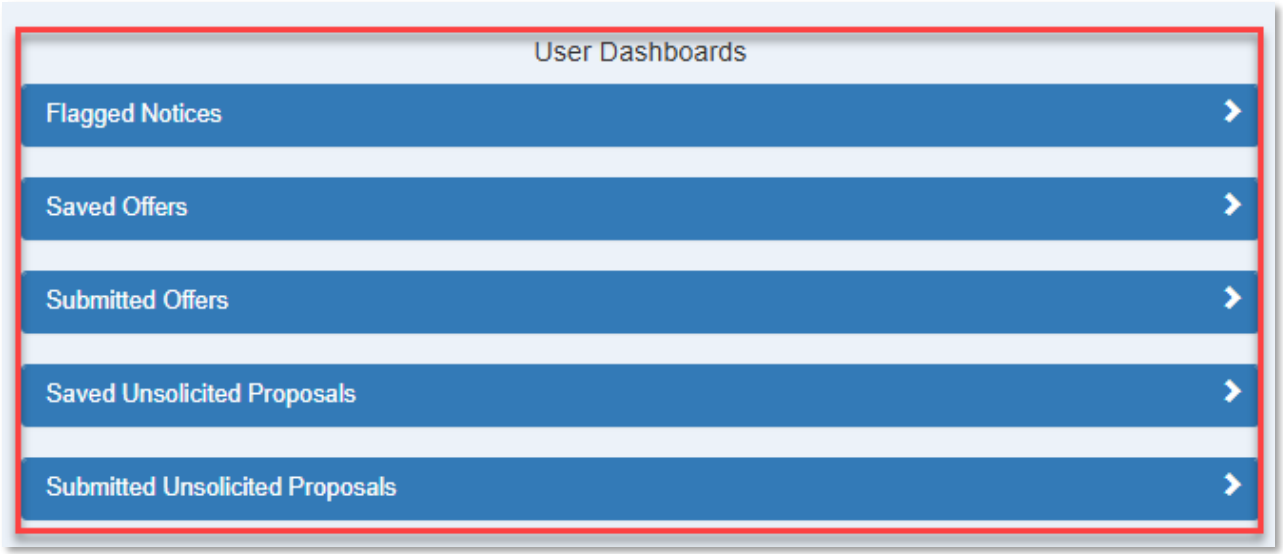
Save Search Pop-Up Fields: *32*

Saved Search Headers: *33*

Delete Saved Search **33**

Search Result Fields: *34*

Saved Search Headers: *35*

Roles	Solicitation Roles with the capability to view User Dashboards • Proposal Manager
User Navigation	Log in to PIEE as a Proposal Manager user to access the Solicitation Application. **User Dashboards** are located on the Solicitation Module Homepage. Select the **arrow icon** to expand a Dashboard. 
Indicating Interest	The Proposal Manager can receive PIEE Notice Update notifications of specific notices by **indicating interest**. By indicating interest, the notice is also be flagged and available to view from the **Flagged Notices** User Dashboard.

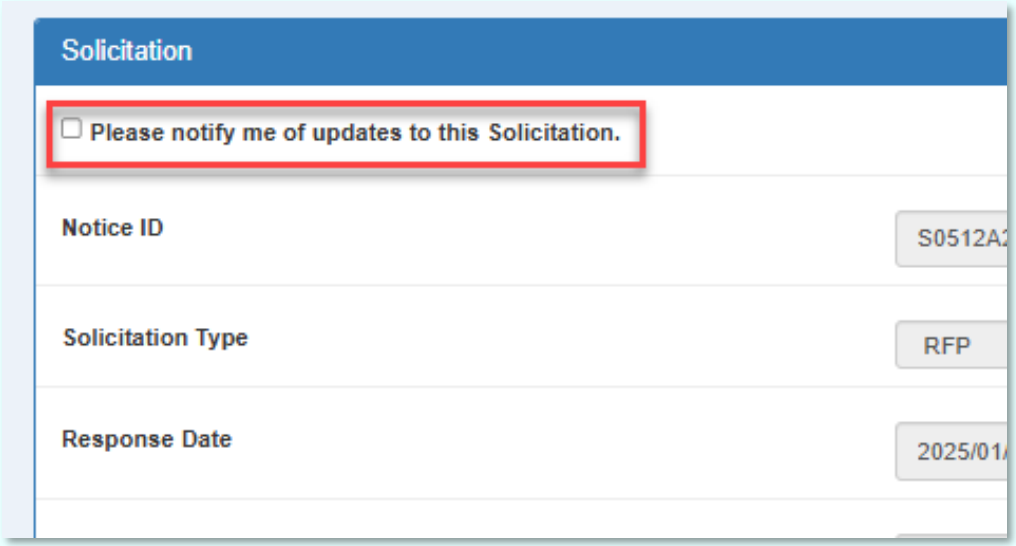
Select **Search** on the Solicitation navigation bar at the top of the screen. The user is led to the **Notice Search Criteria** screen to enter known data of the notice of interest.

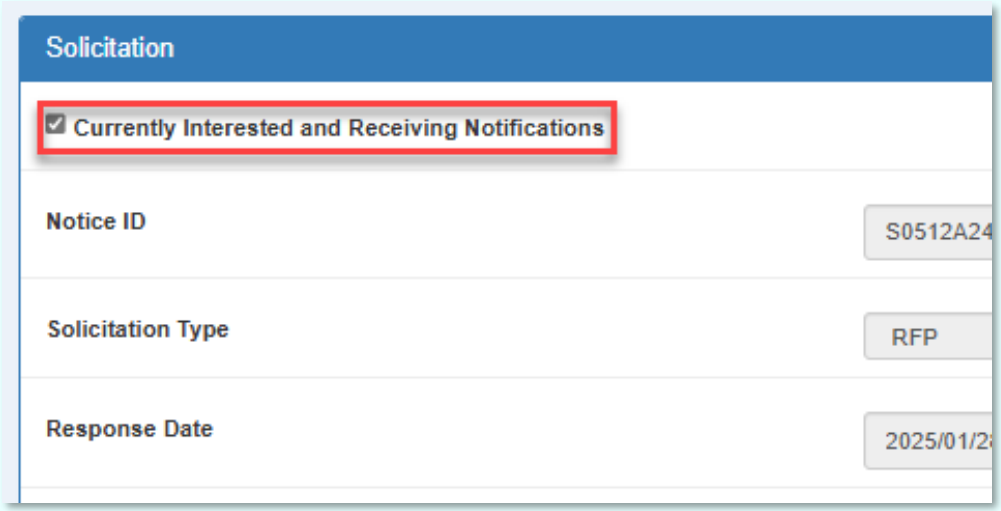
Click the **Search** button to view search details. Refer to Search training for more information located at **WBT > Solicitation > General Functions > Search**.

Click the **Notice ID** hyperlink to view the notice.

Select “Please notify me of updates to this Solicitation**”** checkbox to be notified of updates. The checkbox field now displays “Currently Interested and Receiving Notifications”. Notifications for the notice of interest appears in the **PIEE notifications** and the notice is now available for viewing in the **Flagged Notices** dashboard located on the Solicitation module home screen.

If the Proposal Manager’s CAGE Codes become restricted from the notice, their indicated interest is removed.



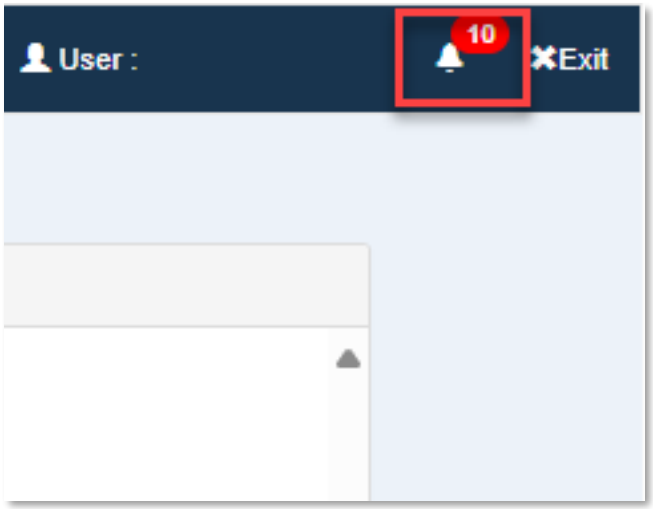


Buttons:

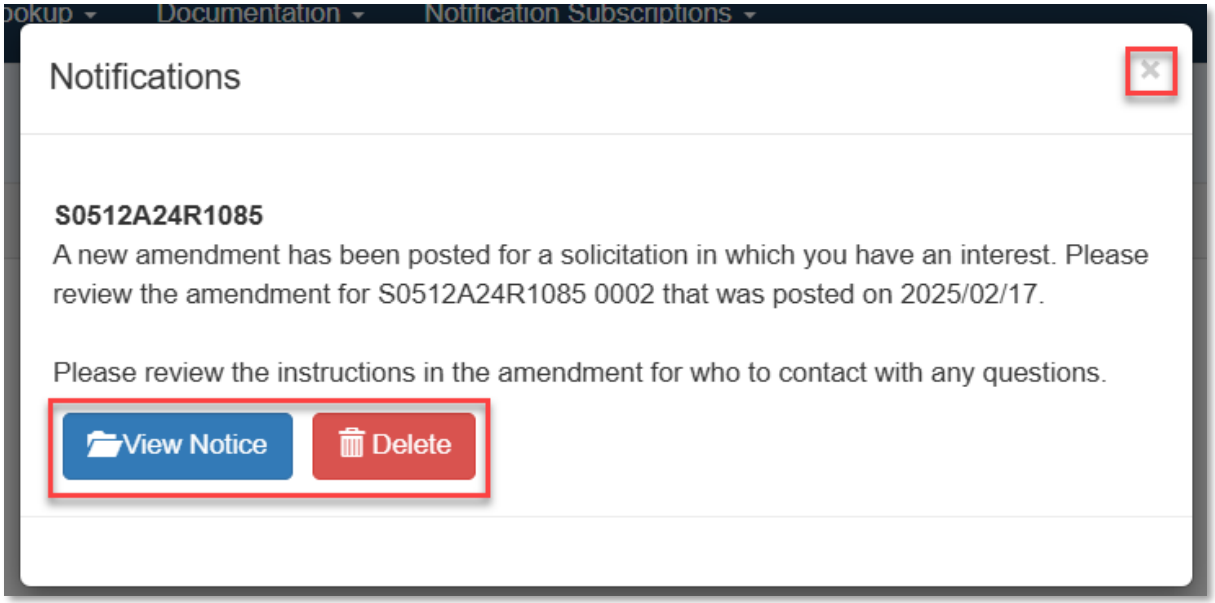
- Update Notification (***checkbox***)

PIEE Notifications

Click the **Bell icon** on the top right of the Solicitation home screen to view system notifications. A pop-up displays showing the notification messages for the Proposal Manager user.



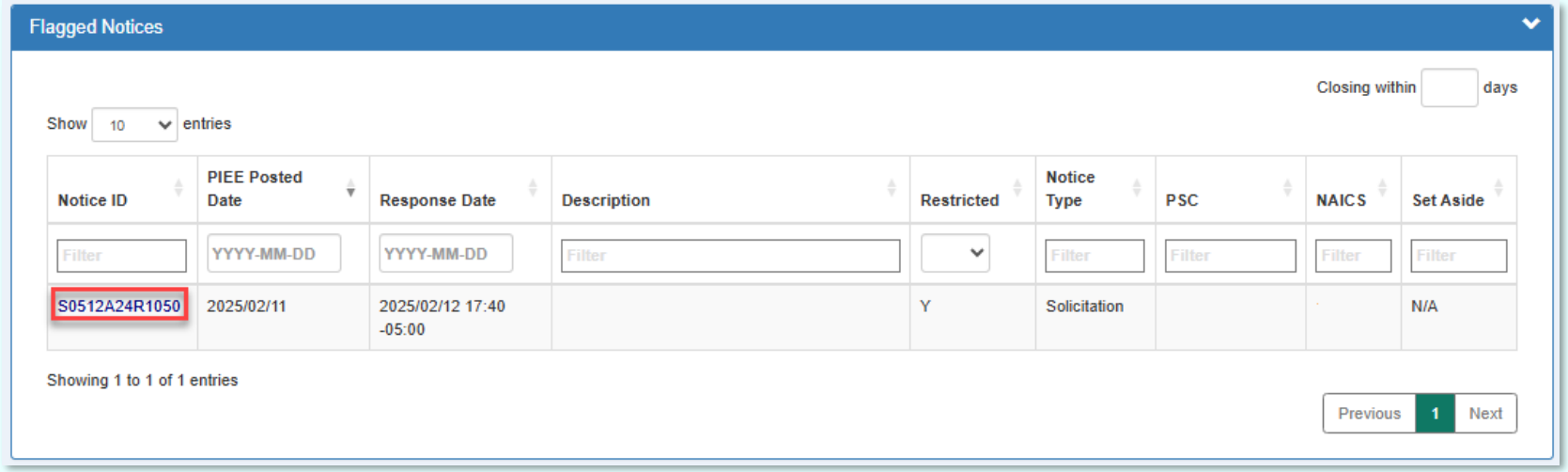
Click the **View Notice** button to access the notice referenced in the notification.

	Click the **Delete** button to delete the notification. Deleting the notification does not remove the user's interest of the specified notice. Click the **X icon** at the top right of the window to close the Notifications pop-up.  *Buttons:* • Bell icon (***to display notification pop-up***) • View Notice (***to access the notice***) • Delete (***to delete the notification***) • X icon (***to close the Notifications pop-up***)
Flagged Notices	The **Flagged Solicitation** dashboard displays all notices in which the Proposal Manager has indicated interest. Click the arrow to expand the Flagged Notices dashboard. Notices can be filtered by entering data or using the drop-down menu of the corresponding header. The user can control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu or by entering a number in the **Closing within # days** field. *Flagged Notices User Dashboard Headers:* • Notice ID (***hyperlink***)

- PIEE Posted Date (***format: YYYY-MM-DD***)
- Response Date (***format: YYYY-MM-DD HH:MM Time Zone***)
- Description
- Restricted
- Notice Type
- PSC
- NAICS
- Set Aside

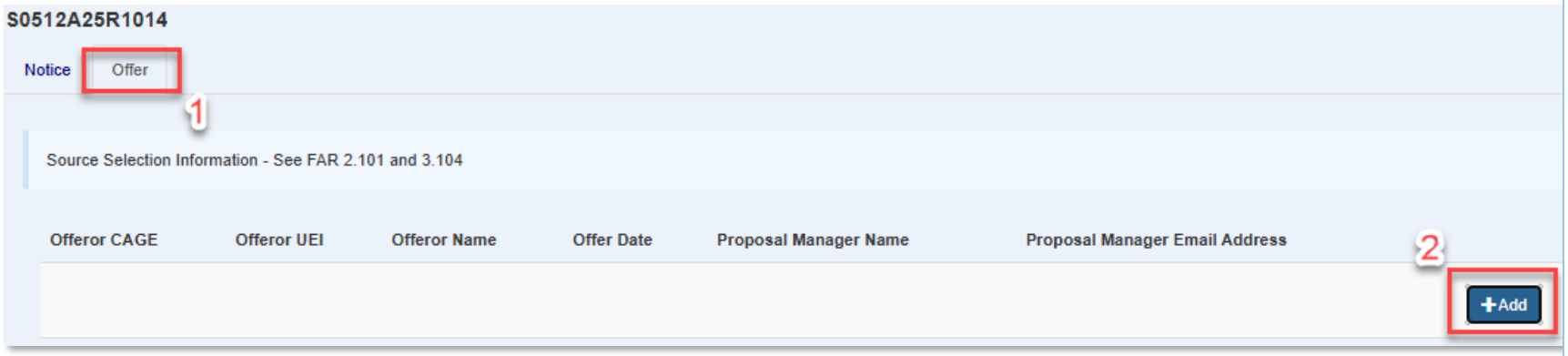
Flagged Notices User Dashboard Filter Fields:

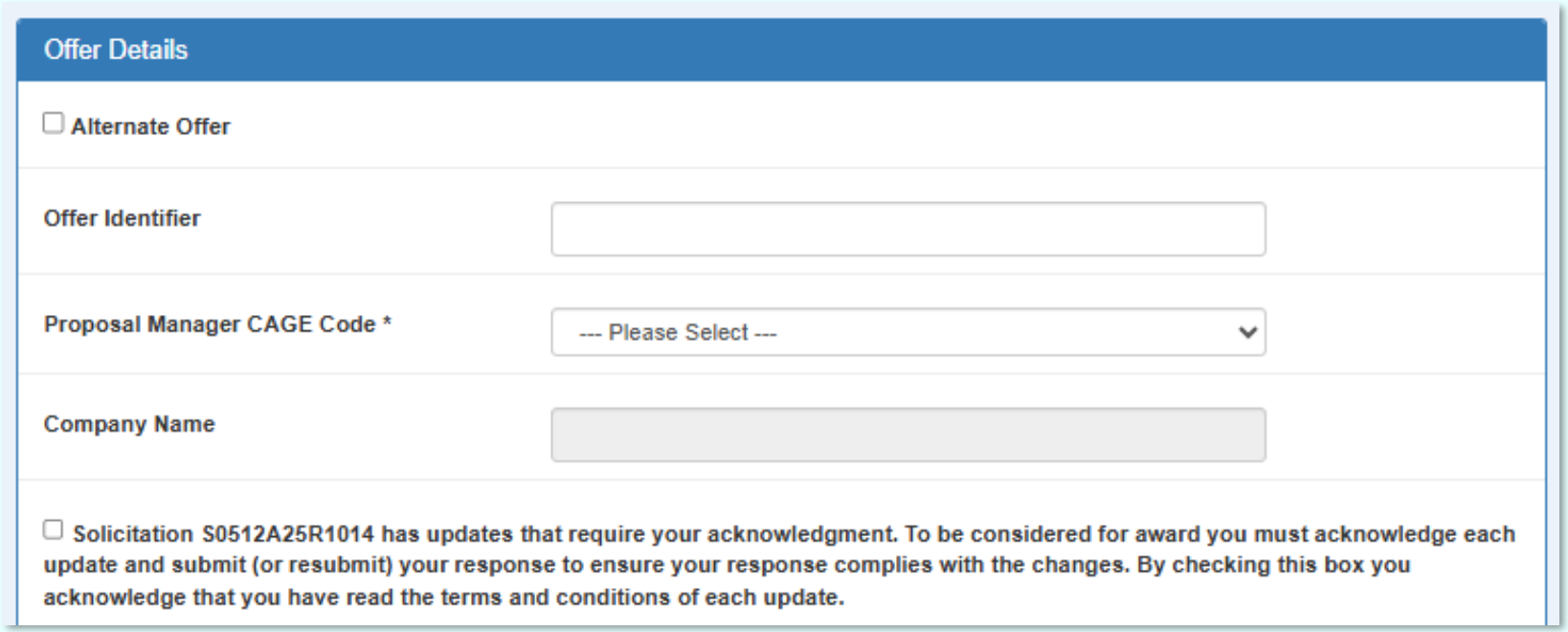
- Show # entries (***options: 10 / 20 / 40 / 60 / 80 / 100***)
- Closing within # days (***field is editable; must be numeric characters***)
- Notice ID (***field is editable***)
- PIEE Posted Date (***format: YYYY-MM-DD***)
- Response Date (***format: YYYY-MM-DD Time Zone***)
- Description (***field is editable***)
- Restricted (***options: Y / N***)
- Notice Type (***field is editable***)
- PSC (***field is editable; must be numeric characters***)
- NAICS (***field is editable; must be numeric characters***)
- Set Aside (***field is editable***)

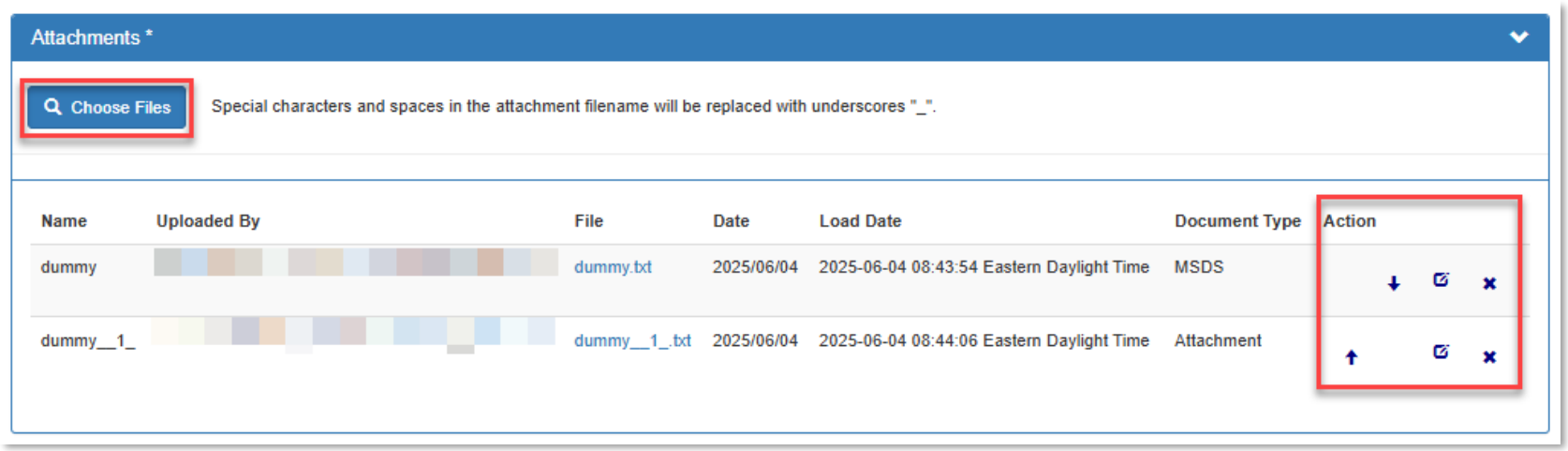


NOTE: Click the arrows next to the headers to sort in ascending/descending order.

Click the **Notice ID** hyperlink in the Notice ID column to view the notice of interest.

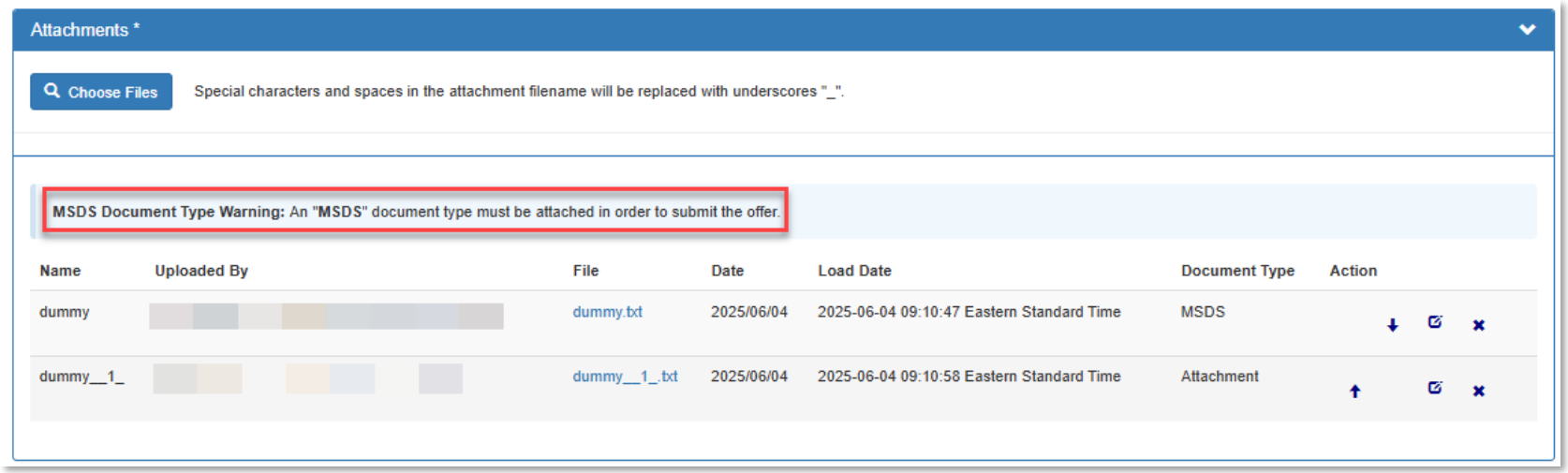
Posting Offer	Click the **Notice ID** hyperlink in the Notice ID column to view the existing notice. Click the **Offer** tab. The user is brought to the Offer screen. Click **Add** to expand the Offer Details and begin the Posting Offer process.  *Offers Headers:* • Offeror CAGE • Offeror UEI • Offeror Name • Offer Date • Proposal Manager Name • Proposal Manager Email Address *Buttons:* • Offer Tab (***leads to the Offer screen***) • Add (***to expand offer details***) *NOTE: If the notice has been updated, then access to the Offer tab is available on the latest update of the notice.*
Offer Details	Select the **Alternate Offer** checkbox to indicate that the offer varies from the solicitation requirements. If the notice has updates, a mandatory checkbox is displayed with a message stating: “Solicitation (Notice ID) has updates that require your acknowledgment. To be considered for award you must acknowledge each update and submit (or resubmit) your response to ensure your response complies with the changes. By checking this box you acknowledge that you have read the terms and conditions of each update.” Select the **checkbox**.

	Offer Details Fields: • Alternate Offer (***checkbox***) • Offer Identifier (***up to 80 alphanumeric characters***) • Proposal Manager CAGE Code (***drop-down; read-only***) • Company Name (***auto-populated from CAGE code***) • Update Acknowledgment (***checkbox; if applicable***) 
Attachments	To add attachments to the offer, click the **Choose Files** button. Added Attachment files are displayed in the table below with populated information. Click the buttons in the **Action** column to reorder, edit, or delete attachments. Click the **x** icon to delete the file and remove the file from the Attachments table.

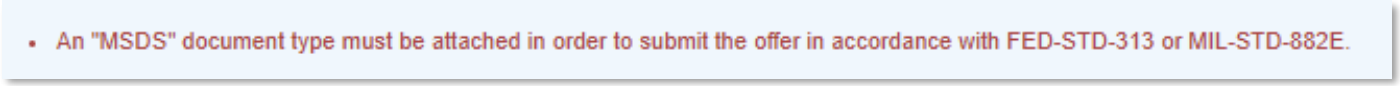


Material Safety Data Sheet (MSDS)

Vendors are required to submit a Material Safety Data Sheet (MSDS) as an attachment with their offers if it has been designated as mandatory by the Solicitation Manager. Material Safety Data Sheets are identified in the **Document Type** field of the **Edit Attachment Information Pop-Up**.



Submitting an offer without attaching the MSDS document displays a message stating: “An “MSDS” document type must be attached in order to submit the offer in accordance with FED-STD-313 or MIL-STD-882E.”



*Attachments * Fields:*

- Name (***up to 255 alphanumeric characters including special characters; excluding specific characters: <>’&”***)
- Uploaded By (***defaults to user’s name and email address***)
- File (***up to 2000 alphanumeric characters***)
- Date (***defaults to date of original uploaded or resubmitted file***)
- Load Date (***displays original date, time, and time zone of uploaded file***)
- Document Type (***options: Attachment / MSDS; defaults to “Attachment”***)
- Action
    - Move Up
    - Move Down
    - Edit
    - Delete

Buttons:

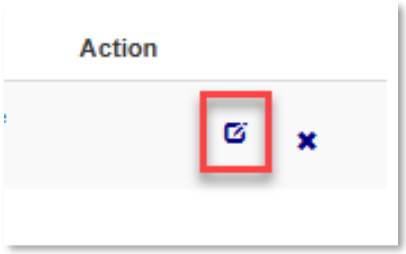
- Choose Files ***(select to locate and attach a file from the local directory)***

Action Buttons:

- Move (***arrows display to reorder multiple attached files***)
- Edit (***leads to Attachment Information pop-up***)
- Delete (***x icon; removes the line item and cannot be restored***)

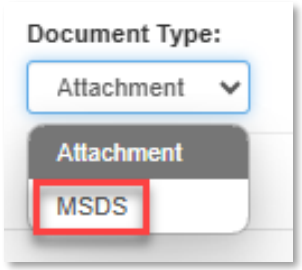
Edit Attachment Information Pop-Up:

To edit an attachment name, select the **Edit** icon in the Action column.

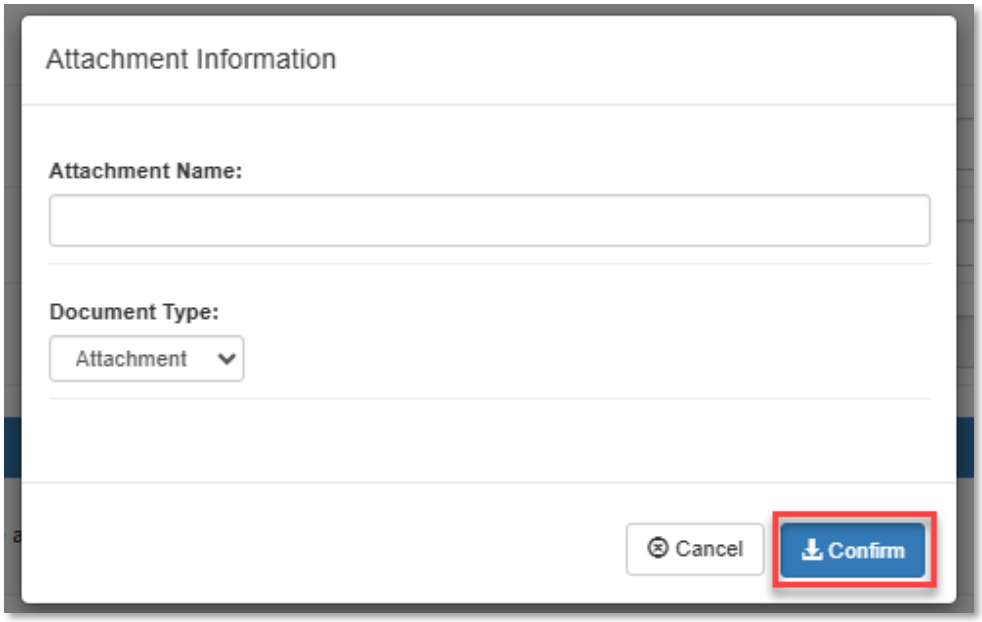


To modify the attachment's name, enter the new file name in the **Attachment Name** field.

To identify the attachment as a **Material Safety Data Sheet (MSDS)** document, select **MSDS** in the **Document Type** drop-down menu.



To confirm all edited attachment information, click the **Confirm** button. All edits are now visible in the Attachments section.



Attachment Information Pop-Up Fields:

- Attachment Name (***up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&"***)
- Document Type (***options: Attachment / MSDS; defaults to "Attachment"***)

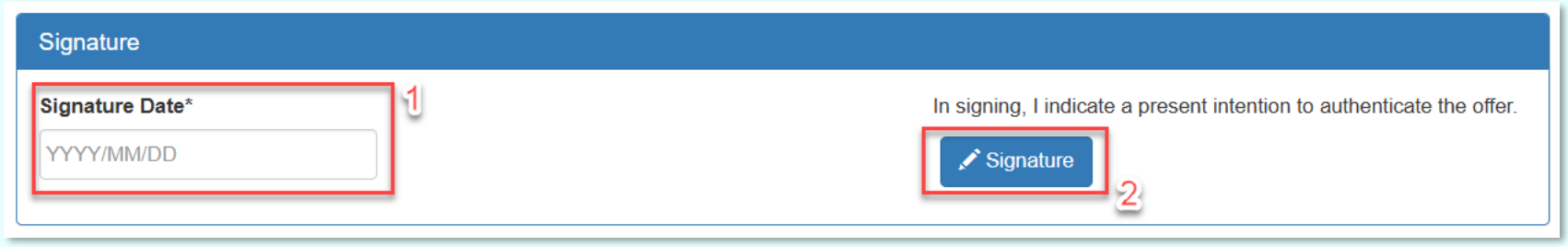
Buttons:

- Cancel (***to disregard changes and close pop-up***)
- Confirm (***to confirm attachment name change***)

Signature

Enter the date in the **Signature Date** field.

Click the **Signature Button** to display the Sign Document pop-up and submit the offer.



Signature Fields:

- Signature Date* (***format: YYYY/MM/DD***)

Buttons:

- Signature (***leads to Sign Document pop-up***)

Sign Document Pop-Up:

Enter the Proposal Manager's **Digital Pin** and **OTP (One-Time Password)**.

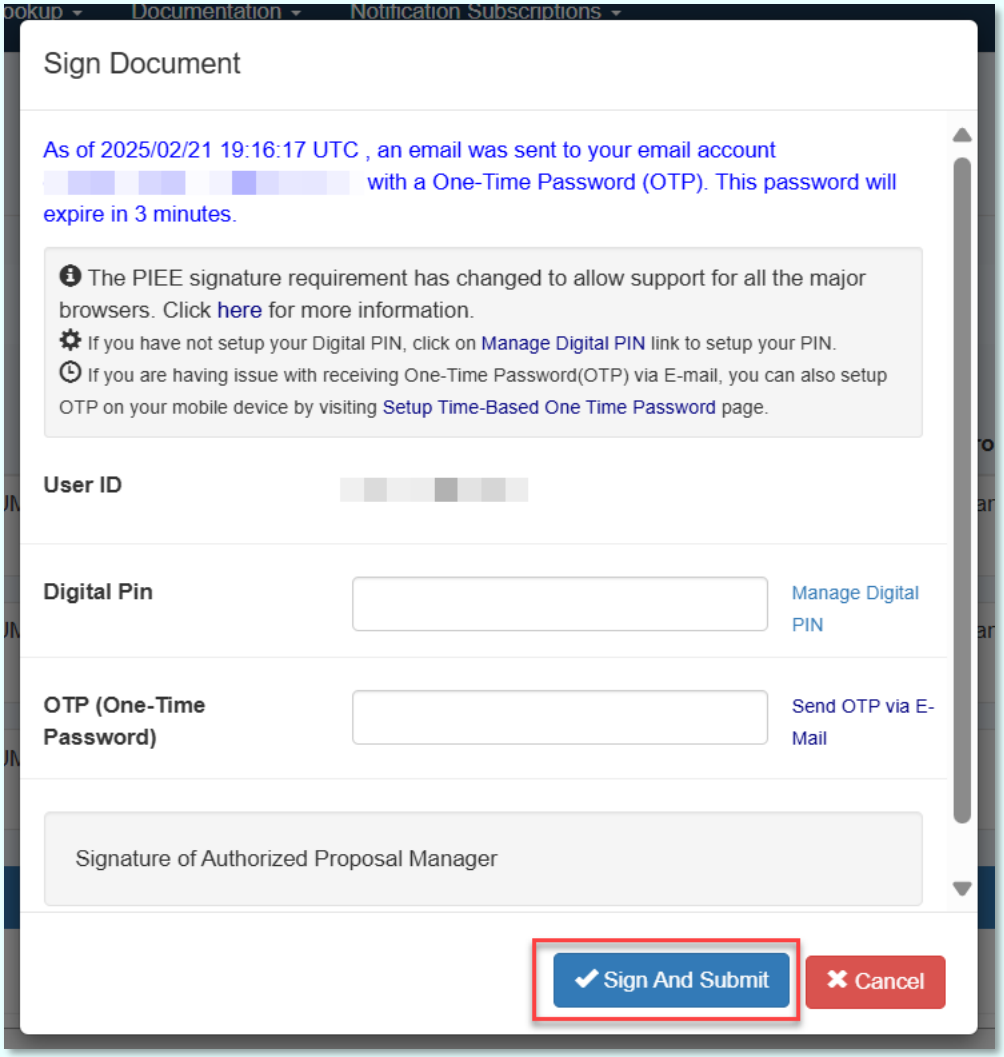
Click the **Sign And Submit** button to submit offer.

Sign Document Pop-up Fields:

- User ID (***auto-populated; defaults to user's name***)
- Digital PIN (***must be 6 numeric characters***)
- OTP (***One-Time Password***)

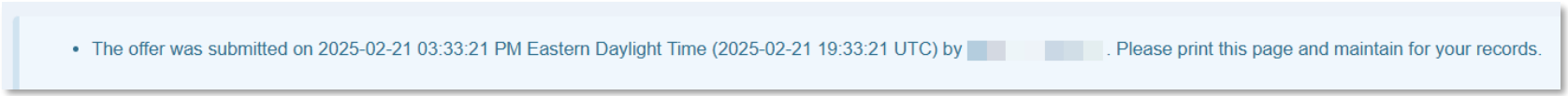
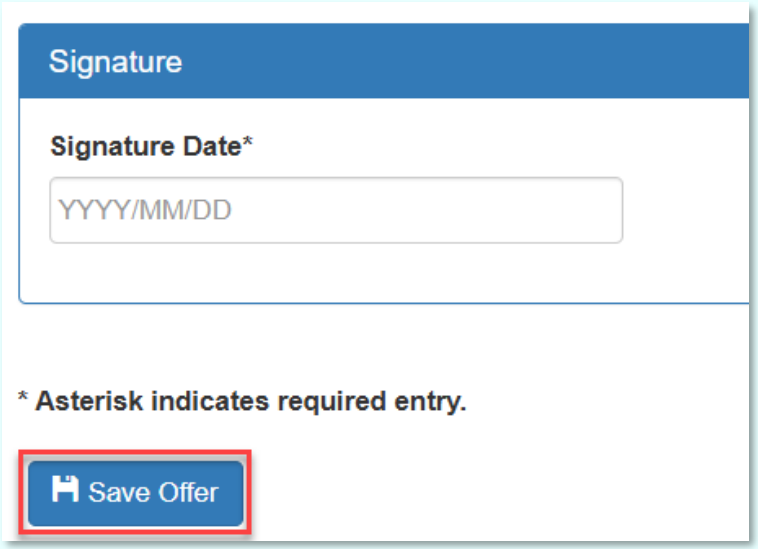
Buttons:

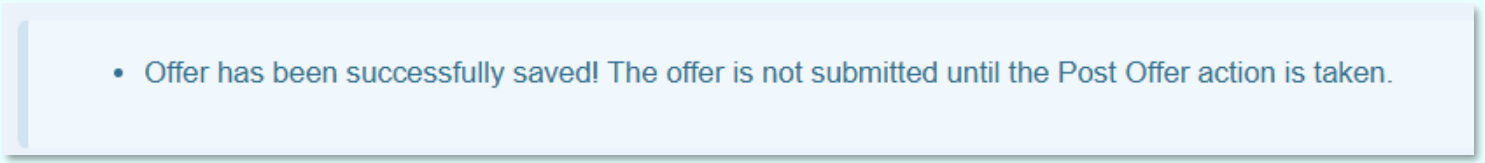
- Sign and Submit (***to submit offer***)
- Cancel (***to close pop-up***)



*NOTE: Digital PIN can be created clicking the **Manage Digital PIN** hyperlink; also located at **My Account > Setup Digital PIN**.*

*NOTE: OTP (One-Time Password) can be sent by clicking the **Send OTP via E-mail**; also located at **My Account > Setup Authenticator App/Time Based One Time Password**.*

Offer Submission Success	Successfully submitting an offer displays a confirmation message stating: “The offer was submitted on (Signature Date, Time, Time Zone) (Signature Date and UTC Time Zone) by (Proposal Manager Name). Please print this page and maintain for your records.” The Solicitation Manager assigned to the notice is notified of the offer submission. 
Save Offer	The **Save Offer** button is available at any time during the creation process prior to submitting the offer. A CAGE Code is required to save an offer. Click the **Save Offer** button. The button saves all data in completed fields that pass validations.  Successfully saving an offer displays a confirmation message at the top of the screen saying: “Offer has been successfully saved! The offer is not submitted until the Post Offer action is taken”. The saved offer is now located on the **Saved Offers** dashboard.



Buttons:

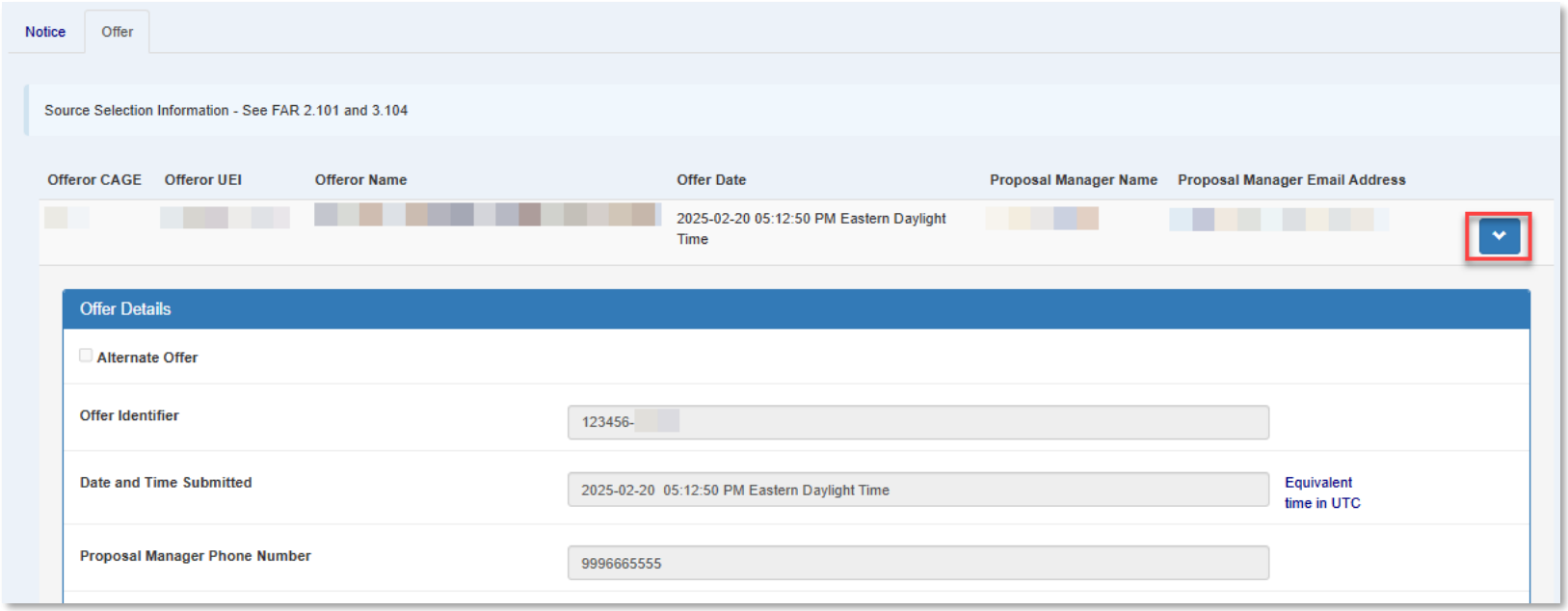
- Save Offer (***saves offer and does not post to PIEE***)

NOTE: Unsolicited Proposals follow the same process for saving a proposal. Saved unsolicited proposals are found in the ***Saved Unsolicited Proposals User Dashboard*** *located on the Solicitation module home screen.*

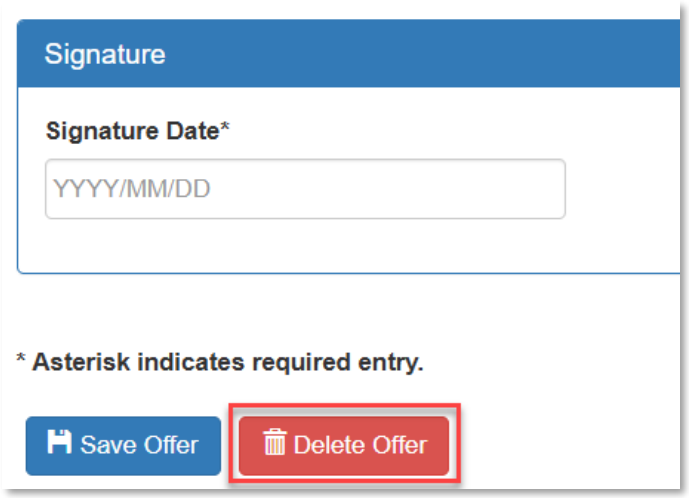
Delete Saved Offer

The **Delete Offer** button becomes visible after a Notice is successfully saved. Locate the offer under **Saved Offers** on the User Dashboards on the Solicitation Module home screen.

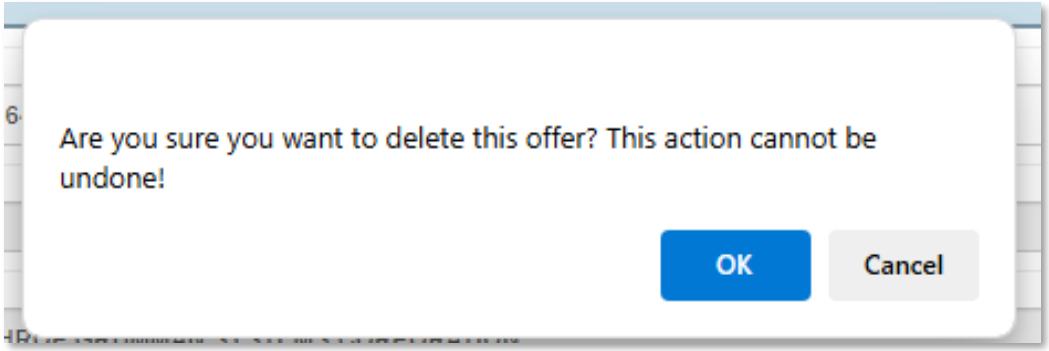
Click the **Notice ID** to view the offers of the selected notice. Click the **arrow** of the saved offer to expand Offer Details.



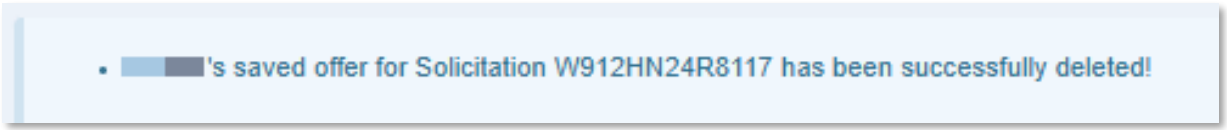
Select the **Delete Offer** button at the bottom of the page to delete a saved offer.



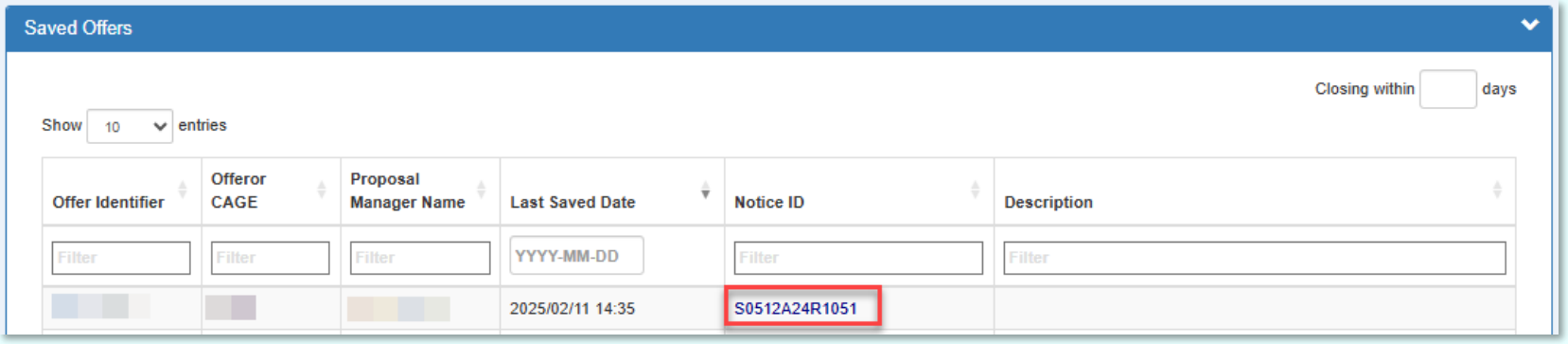
A pop-up displays with a message stating: “Are you sure you want to delete this offer? This action cannot be undone!” Click **OK**.



A confirmation message is displayed stating: “(CAGE Code)’s saved offer for Solicitation (Notice ID) has been successfully deleted!” The saved offer is removed from **Saved Offers** User Dashboard.



	Buttons: • Arrow (***expands Offer Details***) • Save Offer (***saves offer and does not post to PIEE***) • Delete Offer (***removes saved offer from Solicitation database***) *Pop-Up Buttons:* • OK (***confirms deletion***) • Cancel (***closes pop-up***) *NOTE: Unsolicited Proposals follow the same process for deletion of a saved proposal. Saved unsolicited proposals that have been deleted are removed from the **Saved Unsolicited Proposals User Dashboard** located on the Solicitation module home screen.*
Saved Offers	The **Saved Offers** dashboard displays all notices against which the Proposal Manager has saved an offer. Click the arrow to expand the Saved Offers dashboard. Notices can be filtered by entering data in the corresponding header. The user can control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu or by entering a number in the **Closing within # days** field. *Saved Offers User Dashboard Headers:* • Offer Identifier • Offeror CAGE • Proposal Manager Name • Last Saved Date (***format: YYYY-MM-DD HH:MM***) • Notice ID (***hyperlink***) • Description *Saved Offers User Dashboard Filter Fields:* • Show # entries (***options: 10 / 20 / 40 / 60 / 80 / 100***) • Closing within # days (***field is editable; must be numeric characters***) • Offer Identifier (***field is editable***) • Offeror CAGE (***field is editable; must be numeric characters***) • Proposal Manager Name (***field is editable***) • Last Saved Date (***field is editable; format: YYYY-MM-DD HH:MM***) • Notice ID (***field is editable***) • Description (***field is editable***)



Click the **Notice ID** hyperlink in the Notice ID column to view the notice.

Submitted Offers

The **Submitted Offers** dashboard displays all notices against which the Proposal Manager has submitted an offer. Click the arrow to expand the Submitted Offers dashboard.

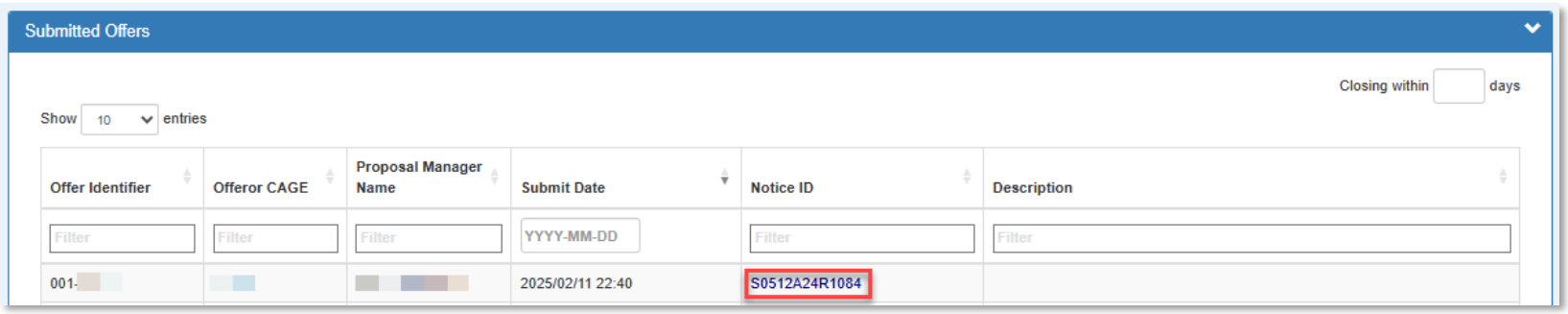
Notices can be filtered by entering data in the corresponding header. The user can control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu or by entering a number in the **Closing within # days** field.

Submitted Offers User Dashboard Headers:

- Offer Identifier
- Offeror CAGE
- Proposal Manager Name
- Submit Date (***format: YYYY-MM-DD HH:MM***)
- Notice ID (***hyperlink***)
- Description

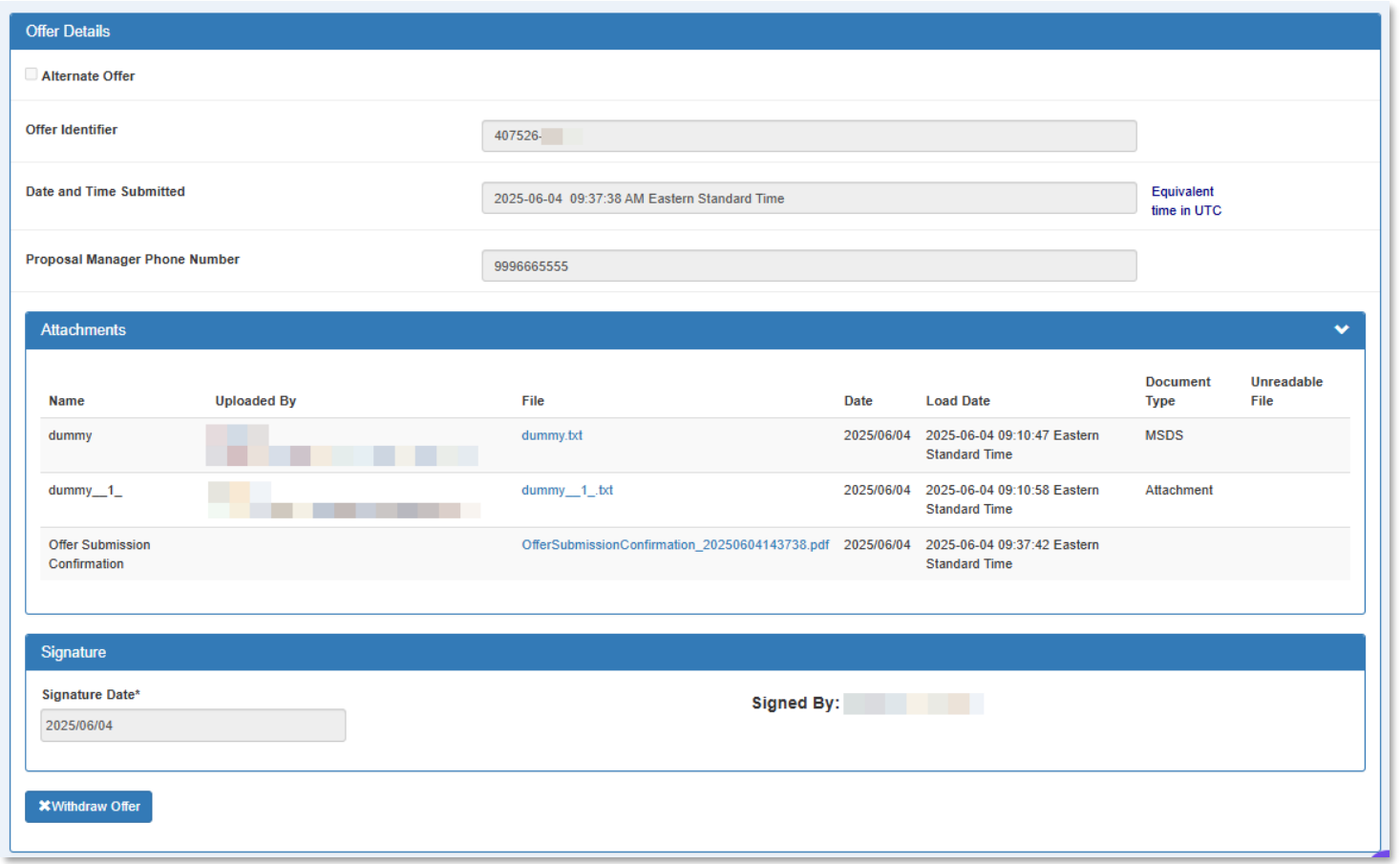
Submitted Offers User Dashboard Filter Fields:

- Show # entries (***options: 10 / 20 / 40 / 60 / 80 / 100***)
- Closing within # days (***field is editable; must be numeric characters***)
- Offer Identifier (***field is editable***)
- Offeror CAGE (***field is editable; must be numeric characters***)
- Proposal Manager Name (***field is editable***)
- Submit Date (***field is editable; format: YYYY-MM-DD HH:MM***)
- Notice ID (***field is editable***)
- Description (***field is editable***)



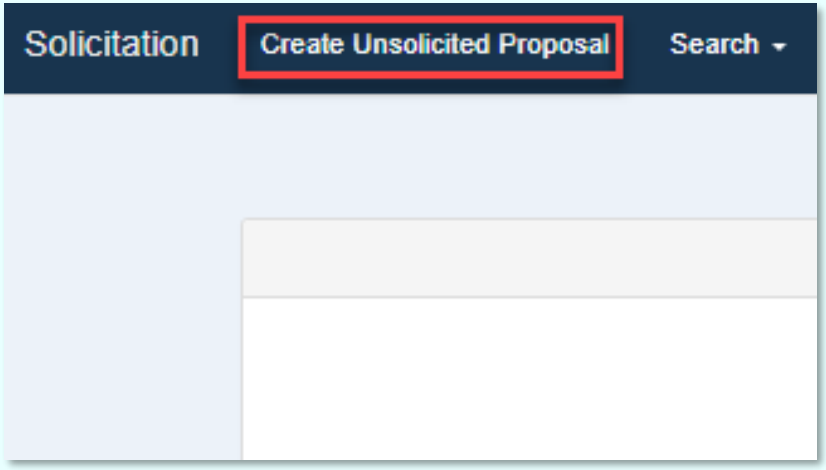
Click the **Notice ID** hyperlink in the Notice ID column to view the notice.

Submitted Offer Details are displayed as read-only. Attachments can be downloaded by clicking the **File** hyperlink adjacent to the file of interest.



Posting Unsolicited Proposal

Click **Create Unsolicited Proposal** on the Solicitation navigation bar. The user is led to Unsolicited Proposal Offer Details page.



Refer to the **Attachments** section of this training for further instructions on adding, editing, or deleting attachments.

Refer to the **Signature** section of this training for further instructions on signing and submitting an Unsolicited Proposal.

Refer to the **Save Offer** section of this training for further instructions on saving an Unsolicited Proposal.

Refer to the **Delete Saved Offer** section of this training for further instructions on deleting a saved Unsolicited Proposal.

Offer Details Fields:

- Offer Identifier (***must be alphanumeric characters***)
- Agency * (***field auto-populates Agency selected in Agency Search pop-up***)
- Proposal Manager CAGE Code * (***drop-down***)
- Company Name (***field auto-populates data associated with Proposal Manager CAGE code***)
- Title * (***up to 255 alphanumeric characters***)
- Abstract * (***up to 2000 alphanumeric characters***)
- Valid From Date * (***date field is editable: format YYYY/MM/DD***)
- Valid To Date *(***date field is editable: format YYYY/MM/DD***)

*Attachments * Fields:*

- Name (***up to 255 alphanumeric characters including special characters; excluding specific characters: <>'&"***)
- Uploaded By (***defaults to user's name and email address***)
- File (***up to 2000 alphanumeric characters***)
- Date (***defaults to date of original uploaded or resubmitted file***)

- Load Date (***displays original date, time, and time zone of uploaded file***)
- Action
    - Move Up
    - Move Down
    - Edit
    - Delete

Signature Fields:

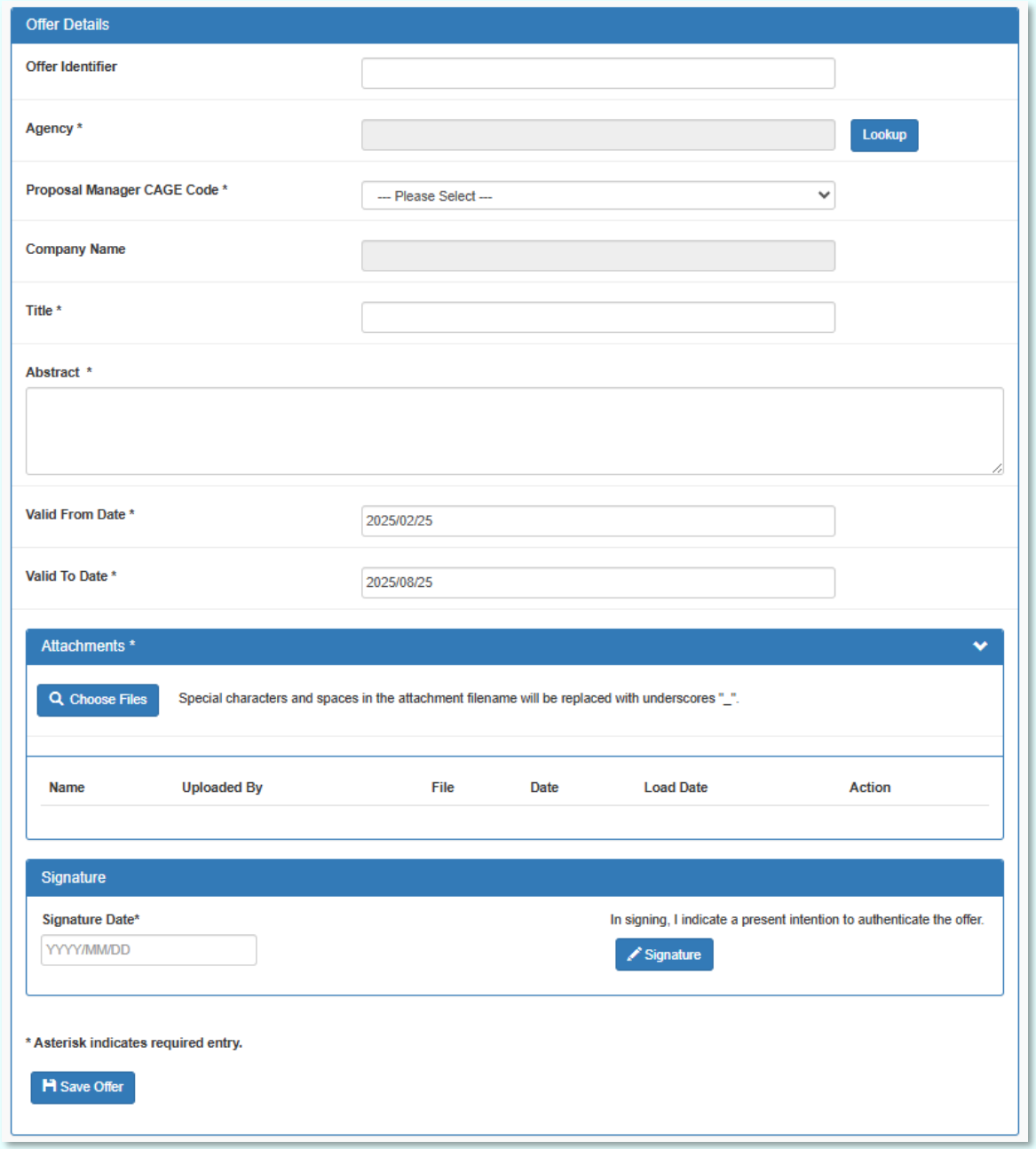
- Signature Date* (***format: YYYY/MM/DD***)

Buttons:

- Lookup (***leads to Agency Search pop-up***)
- Choose Files (***select to locate and attach a file from the local directory***)
- Signature (***leads to Sign Document pop-up***)
- Save Offer (***saves offer and does not post to PIEE***)

Action Buttons:

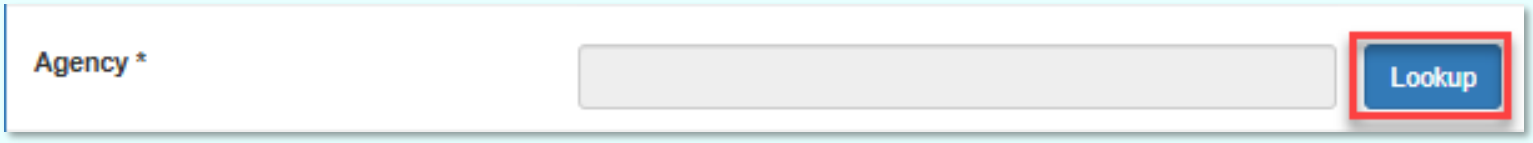
- Move (***arrows display to reorder multiple attached files***)
- Edit (***leads to Attachment Information pop-up***)
- Delete (***x icon; removes the line item and cannot be restored***)



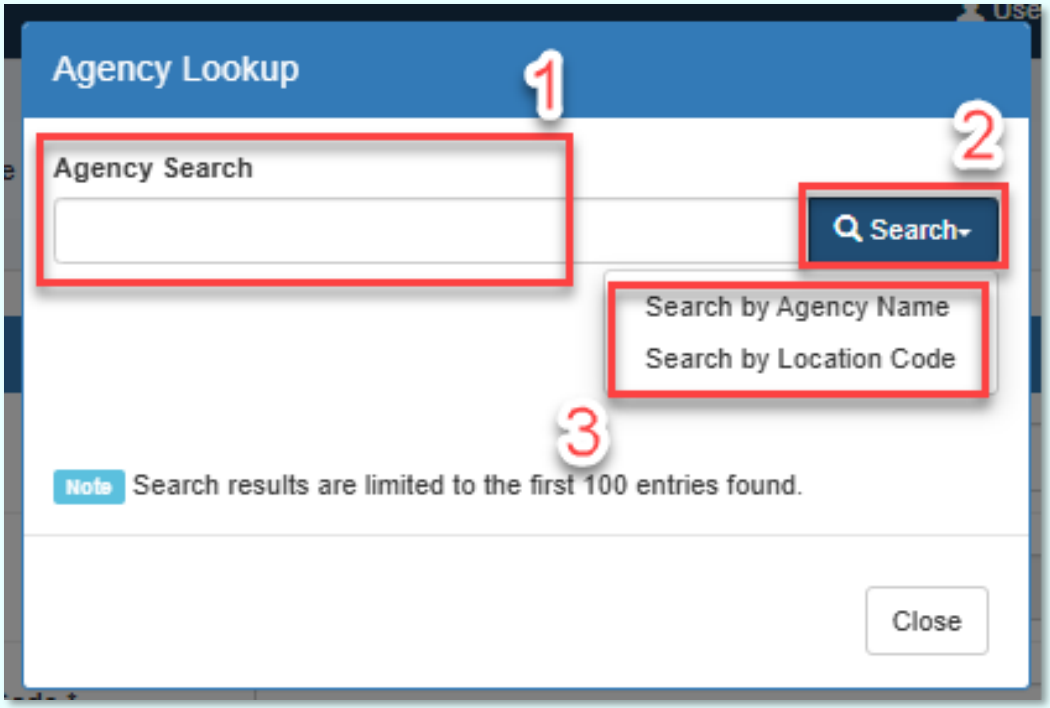
NOTE: Unsolicited Proposals follow the same process as Offers for attachments, signing and submitting a signature, saving an incomplete proposal, and deleting a saved proposal.

Agency Lookup Pop-Up:

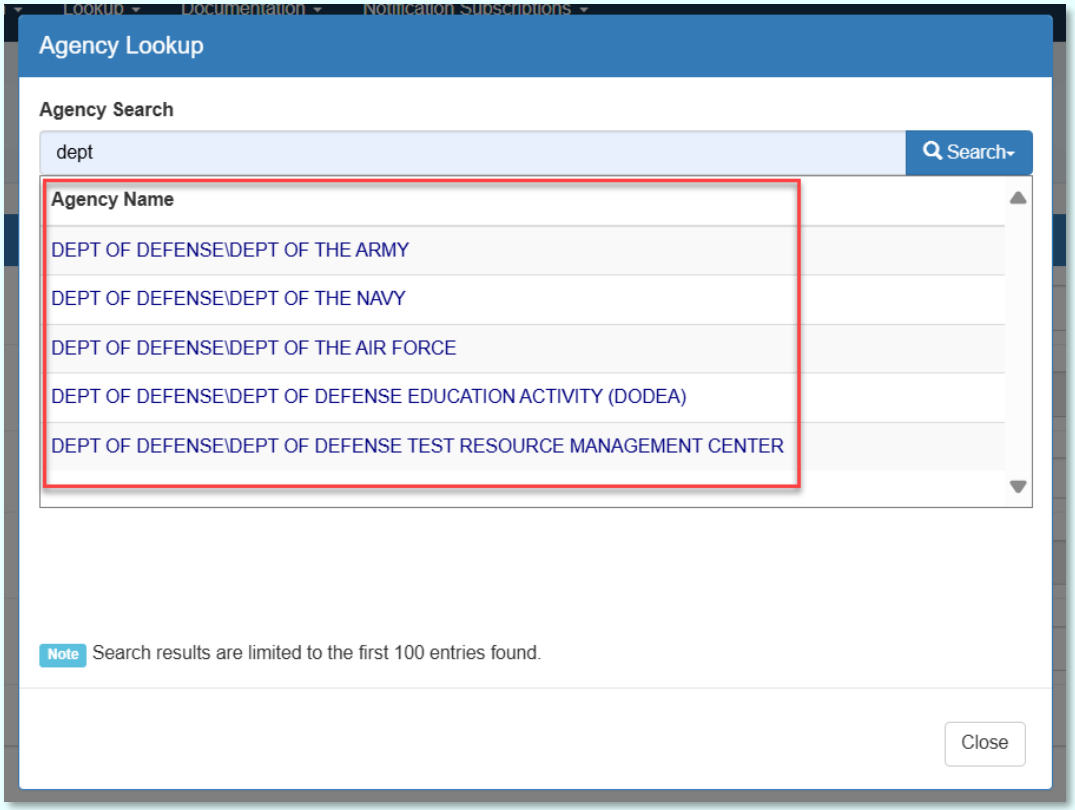
Click the **Lookup** button.



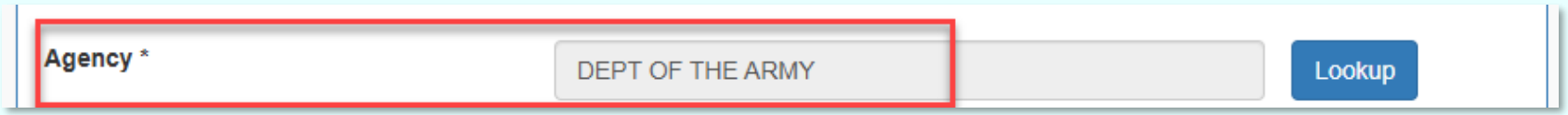
Enter data of the Agency in the **Agency Search** field and click the **Search** button. A drop-down menu displays two search options. Click **Search by Agency Name** or **Search by Location Code**.



A table displays the Agency Name search results. Click the **Agency Name hyperlink** associated with agency data searched.



The pop-up closes and the Agency data is auto-populated in the **Agency** field.

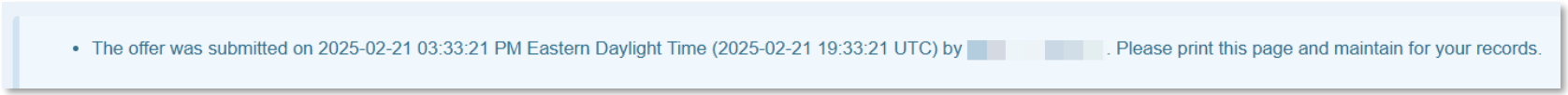


Offer Details Fields:

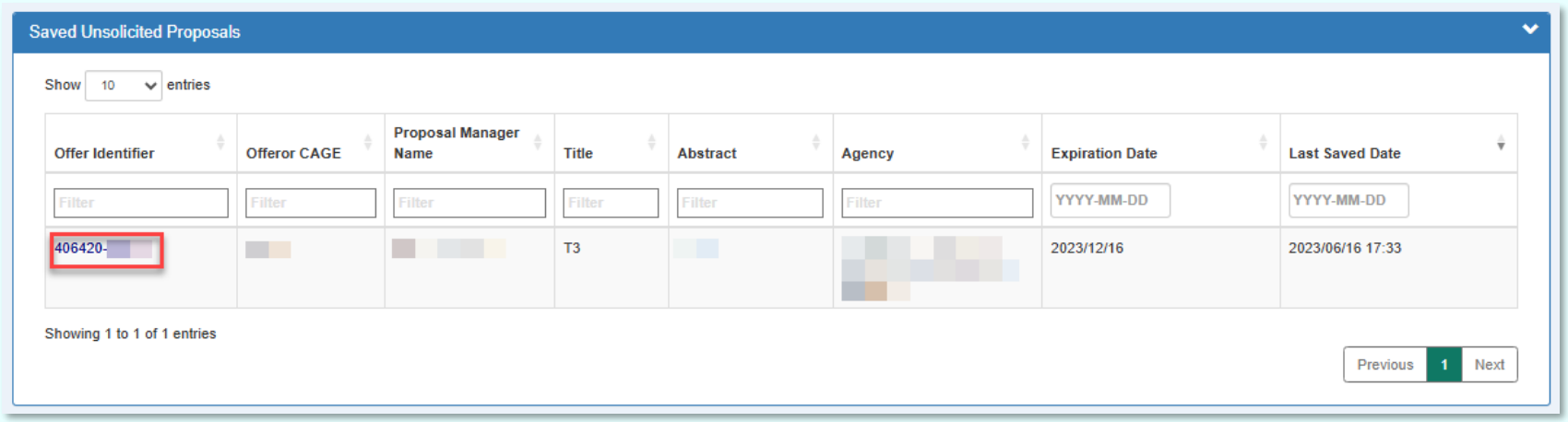
- Agency * (***field auto-populates Agency selected in Agency Search pop-up***)

Agency Lookup Fields:

- Agency Search (***field is editable***)

	Offer Details Buttons: • Lookup (***leads to Agency Lookup pop-up***) *Agency Lookup Buttons:* • Search (***drop-down; options: Search by Agency Name / Search by Location Code***) • Close (***disregards search and closes pop-up***) *NOTE: The selected Agency cannot be deleted once selected but can be overwritten by selecting another Agency Name in the Agency Lookup pop-up.*
Unsolicited Proposal Submission Success	Successfully submitting an unsolicited proposal displays a confirmation message stating: "The offer was submitted on (Signature Date, Time, Time Zone) (Signature Date and UTC Time Zone) by (Proposal Manager Name). Please print this page and maintain for your records." 
Saved Unsolicited Proposals	The **Saved Unsolicited Proposals** dashboard displays all unsolicited proposals which the Proposal Manager has saved prior to submission. Saved unsolicited proposals can be filtered by entering data in the corresponding header. The user can control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu. *Saved Unsolicited Proposals User Dashboard Headers:* • Offer Identifier (***hyperlink***) • Offeror CAGE • Proposal Manager Name • Title • Abstract • Agency • Expiration Date (***field is editable; format: YYYY-MM-DD***) • Last Saved Date (***field is editable; format: YYYY-MM-DD HH:MM***) *Saved Unsolicited Proposals User Dashboard Filter Fields:* • Show # entries (***options: 10 / 20 / 40 / 60 / 80 / 100***) • Offer Identifier (***field is editable***) • Offeror CAGE (***field is editable; must be numeric characters***) • Proposal Manager Name (***field is editable***) • Title (***field is editable***)

- Abstract (*field is editable*)
- Agency (*field is editable*)
- Expiration Date (*field is editable; format: YYYY-MM-DD*)
- Last Saved Date (*field is editable; format: YYYY-MM-DD HH:MM*)



Click the **Offer Identifier** hyperlink in the Offer Identifier column to view the unsolicited proposal.

Submitted Unsolicited Proposals

The **Submitted Unsolicited Proposals** dashboard displays all submitted unsolicited proposals for the offeror CAGE code.

Submitted unsolicited proposals can be filtered by entering data in the corresponding header. The user can control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu.

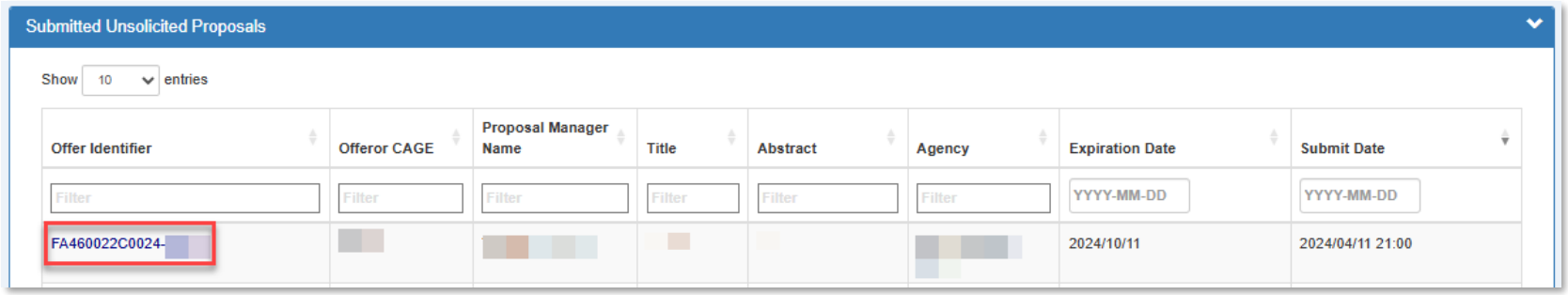
Submitted Unsolicited Proposals User Dashboard Headers:

- Offer Identifier (*hyperlink*)
- Offeror CAGE
- Proposal Manager Name
- Title
- Abstract
- Agency
- Expiration Date (*field is editable; format: YYYY-MM-DD*)
- Last Saved Date (*field is editable; format: YYYY-MM-DD HH:MM*)

Submitted Unsolicited Proposals User Dashboard Filter Fields:

- Show # entries (*options: 10 / 20 / 40 / 60 / 80 / 100*)
- Offer Identifier (*field is editable*)

- Offeror CAGE (***field is editable; must be numeric characters***)
- Proposal Manager Name (***field is editable***)
- Title (***field is editable***)
- Abstract (***field is editable***)
- Agency (***field is editable***)
- Expiration Date (***field is editable; format: YYYY-MM-DD***)
- Last Saved Date (***field is editable; format: YYYY-MM-DD HH:MM***)

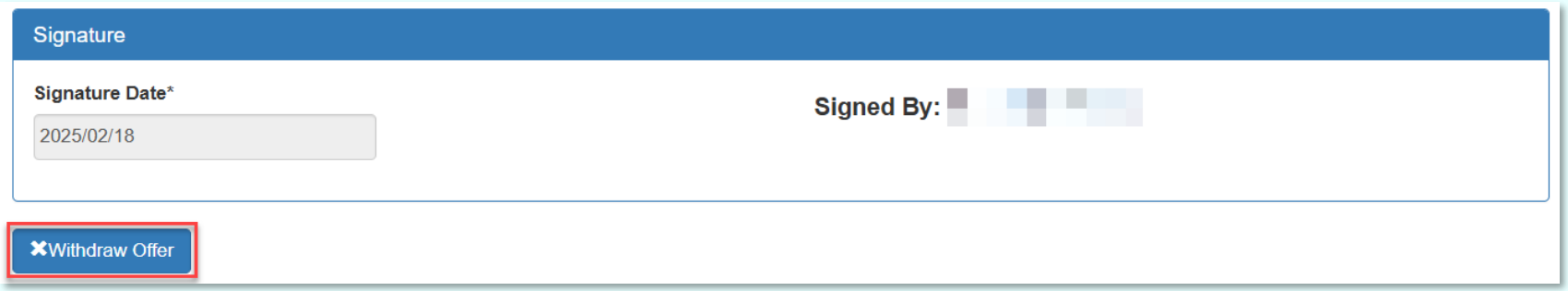


Click the **Offer Identifier** hyperlink in the Offer Identifier column to view the unsolicited proposal.

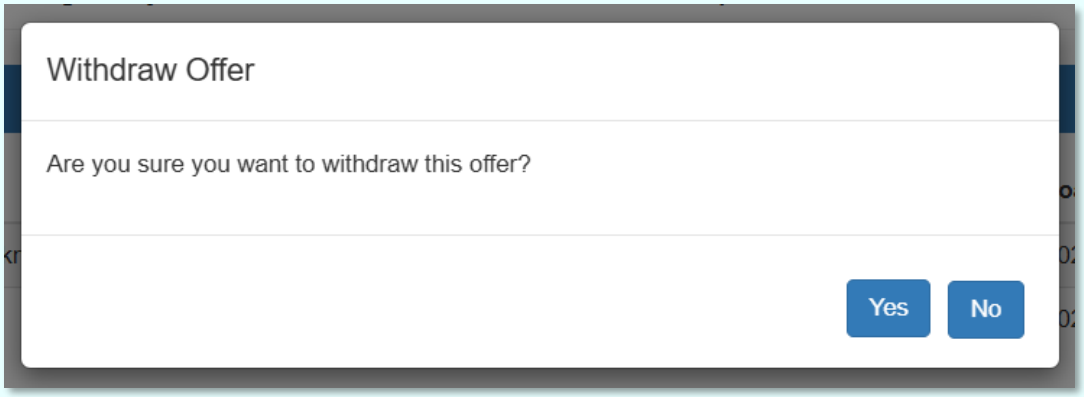
Withdraw Offer/Unsolicited Proposal

The Proposal Manager can withdraw a submitted offer or unsolicited proposal to have it removed from consideration prior to a Solicitation Manager's action. Once an offer or unsolicited proposal has been accepted or rejected by the Solicitation Manager, it cannot be withdrawn.

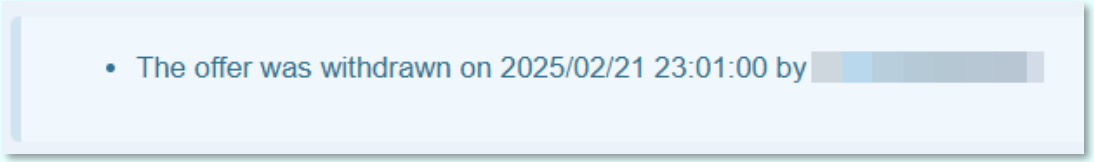
Click the **Withdraw Offer** button located at the bottom of the submitted offer details.



A pop-up displays with a message asking: "Are you sure you want to Withdraw this offer?" Click **Yes**.



Successfully withdrawing an offer displays a message at the top of the screen stating: “The offer was withdrawn on (Date and Time) by (Proposal Manager’s Name).” The submitted offer is removed from the **Submitted Offers** user dashboard.



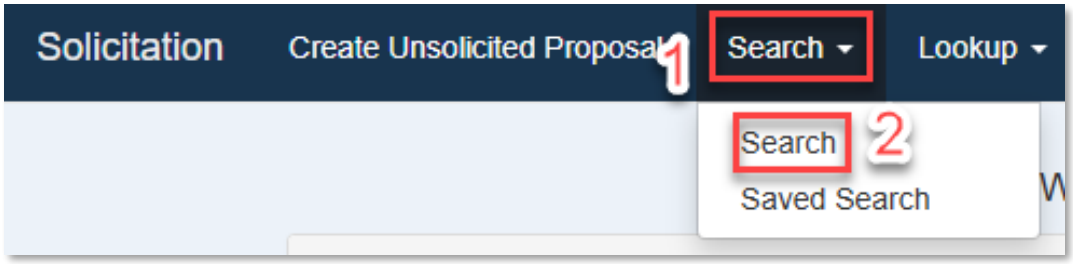
Buttons:

- Withdraw (***leads to the Withdraw Offer pop-up***)

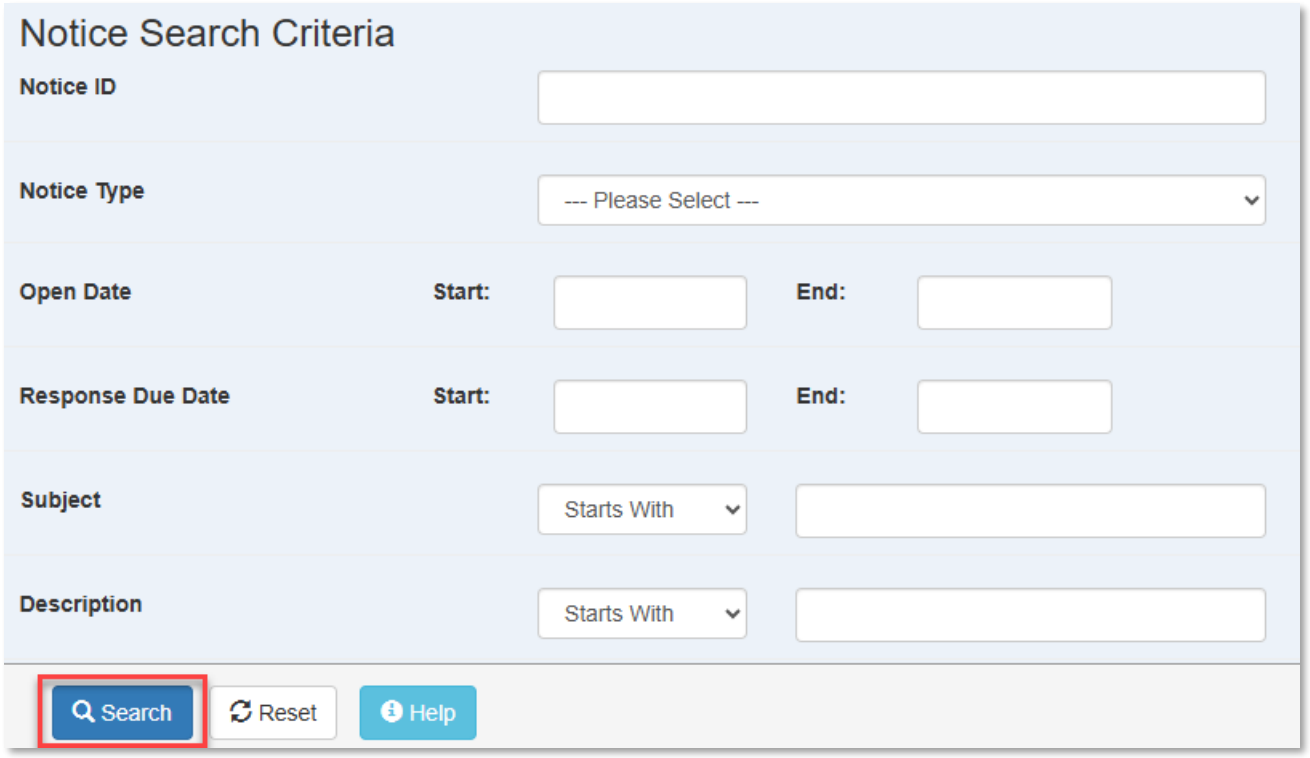
Pop-Up Buttons:

- Yes (***confirms withdrawal of Offer/Unsolicited Proposal***)
- No (***closes Withdraw Offer pop-up***)

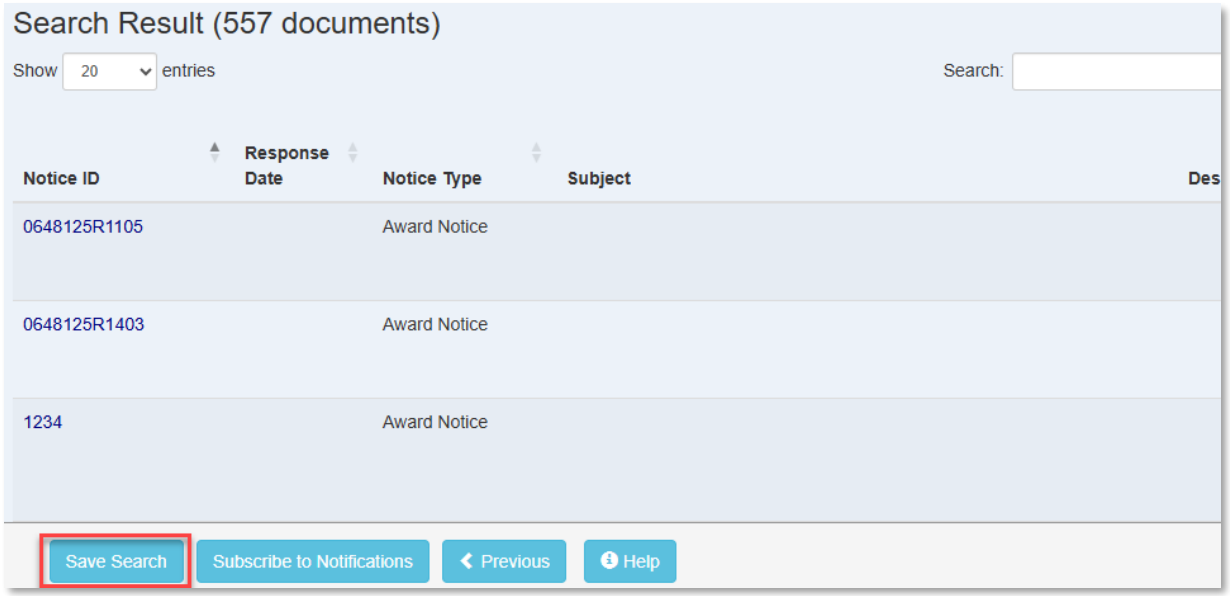
Saved Search	Proposal Managers have the ability to save searches for easy access and future use. Click **Search** in the Solicitation navigation bar. A drop-down menu is displayed. Click **Search**. The user is led to Notice Search Criteria screen.



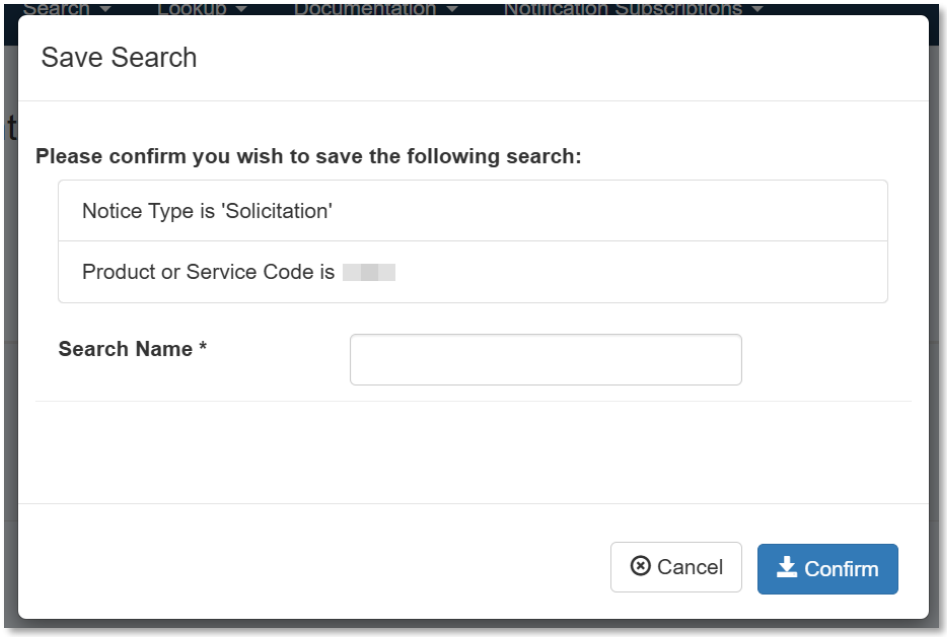
Enter data in the Notice Search Criteria fields. Click **Search**. The user is led to the Search Results screen displaying results that match the criterion entered.



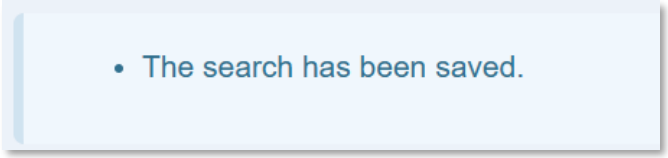
Click **Save Search** on the Search result screen.



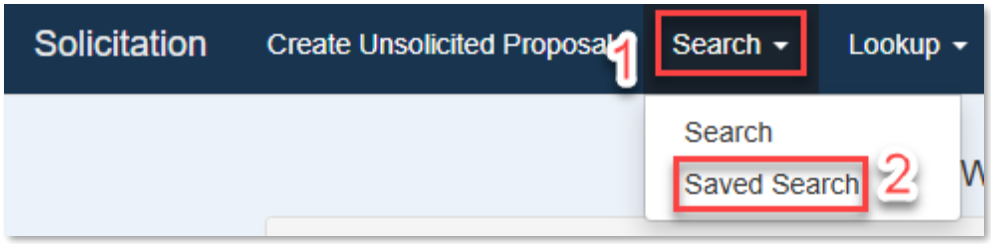
A pop-up displays a confirmation message stating: “Please confirm you wish to save the following search:” and a table of the data entered in the Notice Search Criteria fields. Enter a unique **Search Name** in the editable field for future reference and click **Confirm**.



A message displays at the top of the Search Result screen stating: “The search has been saved.”



To view searches that have been saved, click **Search**, then select **Saved Search** in the navigation bar at the top of the screen.



The user is led to the Saved Search screen displaying all searches saved by the user. Saved searches can be filtered by entering data in the **Filter** field. The user can also control the number of entries displayed on the table by selecting an option on the **Display # items** drop-down menu.

Click **Search** in the **Action** column to search the Solicitation database based on the Search values listed in the Search column. The results of the saved search are displayed on the Search Results screen.

Notice Search Criteria Fields:

- Notice ID (***up to 127 alphanumeric characters including special characters***)
- Notice Type (***options: Special Notice / Solicitation / Combined Synopsis/Solicitation / Presolicitation / Sources Sought / Award / Consolidate/(Substantially) Bundle / Justification and Approval***)
- Open Date (***subfields: 'Start' / 'End'; date field is editable: format YYYY/MM/DD***)
- Response Due Date (***subfields: 'Start' / 'End'; date field is editable: format YYYY/MM/DD***)
- Subject (***parameters: Starts With / Equal To / Contains / Ends With***)
- Description (***parameters: Starts With / Equal To / Contains / Ends With***)
- Product or Service Code (***field is editable; must be valid codes in database***)
- NAICS (***field is editable; must be valid codes in database***)
- Set Aside Code (***searchable drop-down***)
    - Total Small Business Set-Aside
    - Partial Small Business Set-Aside
    - 8(a) Set-Aside
    - Historically Underutilized Business (HUBZone) Set-Aside
    - Service-Disabled Veteran-Owned Small Business (SDVOSB) Set-Aside
    - Women-Owned Small Business (WOSB) Program Set-Aside
    - Economically Disadvantaged WOSB (EDWOSB) Program Set-Aside
    - 8(a) Sole Source
    - Historically Underutilized Business (HUBZone) Sole Source
    - Service-Disabled Veteran-Owned Small Business (SDVOSB) Sole Source
    - Women-Owned Small Business (WOSB) Program Sole Source
    - Economically Disadvantaged WOSB (EDWOSB) Program Sole Source
    - Local Area Set-Aside
    - Competitive 8(a)
    - Economically Disadvantaged Woman Owned Small Business
    - Emerging Small Business
    - HUBZone
    - Partial HBCU / MI
    - Partial Small Business
    - Service-Disabled Veteran-Owned Small Business
    - Total HBCU / MI
    - Total Small Business
    - Veteran-Owned Small Business
    - Woman Owned Small Business
- Place of Performance Zip Code ***(must be 5 numeric characters)***
- Contracting Office DoDAAC (***must be 6 alphanumeric characters; excluding special characters)***
- Status (***options: Open / Closed / Incomplete / No Response Due Date)***

Search Result Fields:

- Display # Items (***options: 10 / 25 / 50 / 100; controls number of entries appearing in the saved search table)***
- Filter (***field is editable; can filter results by keywords entered by the user***)

Save Search Pop-Up Fields:

- Search Name * (***field is editable***)

Saved Search Headers:

- Search Name
- Search
- Action

Action Buttons:

- Search (***leads to search results)***
- Delete (***remove save search***)

Notice Search Criteria Buttons:

- Lookup (***button displays beside the 'Product or Service Code' and 'NAICS' fields; leads to Lookup search pop-ups***)
- Search (***leads to search results screen***)
- Reset (***deletes all entered data***)
- Help (***displays help information***)

Search Results Buttons:

- Save Search (***leads to Save Search pop-up***)
- Subscribe to Notifications (***leads to Subscribe to Notifications pop-up***)
- Previous (***to navigate back to Create Notice screen***)
- Help (***displays help information***)

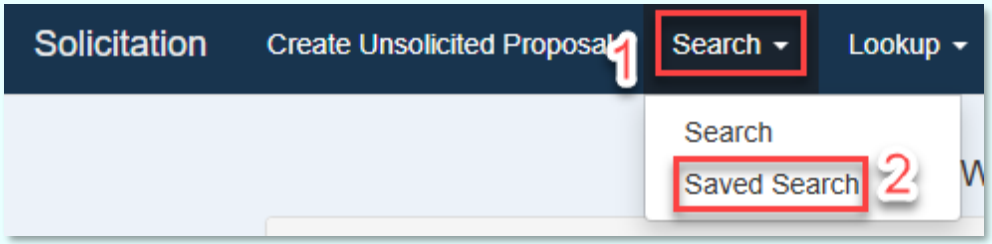
Save Search Pop-Up:

- Cancel (***to close pop-up***)
- Confirm (***to save search***)

NOTE: ***Open Date***, ***Response Due Date, Place of Performance Zip Code***, ***Contracting Office DoDAAC***, *and* ***Status*** *cannot be used to subscribe to notifications.*

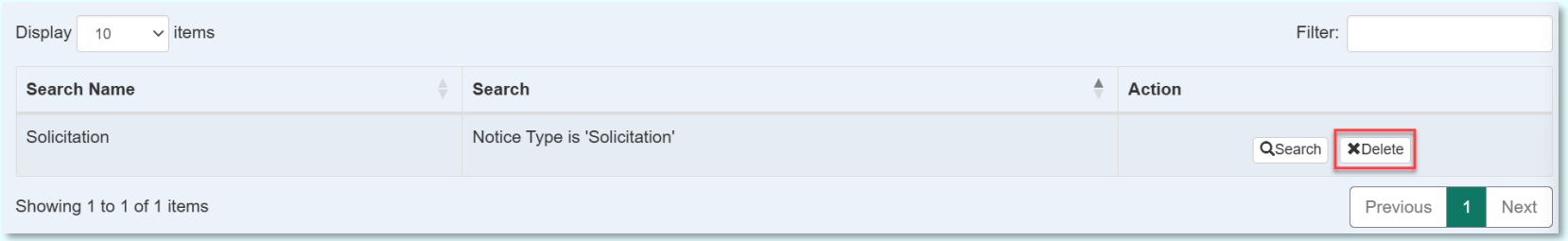
Delete Saved Search

To delete a saved search, click **Search**, then select **Saved Search** in the navigation bar at the top of the screen.

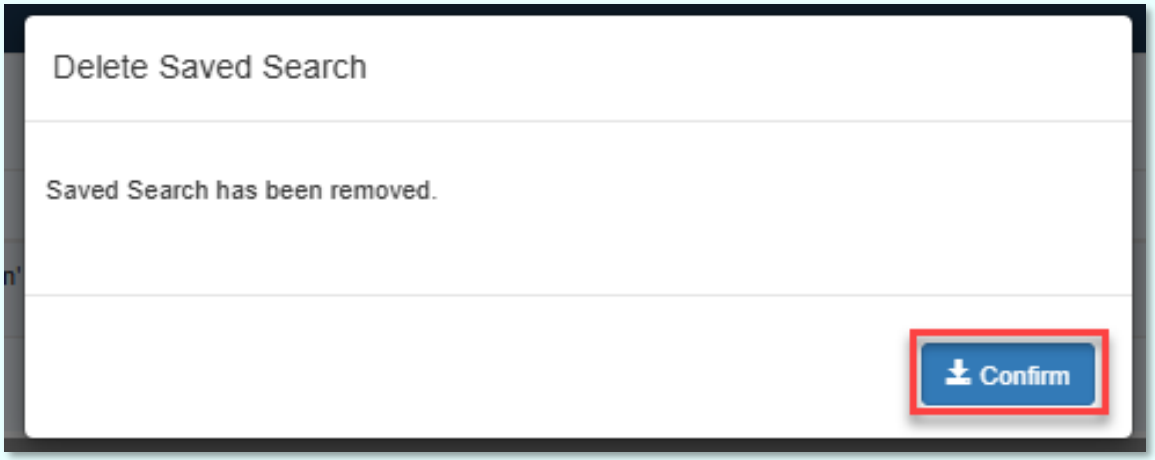


The user is led to the Saved Search screen displaying all searches saved by the user. Saved searches can be filtered by entering data in the **Filter** field. The user can also control the number of entries displayed on the table by selecting an option on the **Display # items** drop-down menu.

Click the **Delete** button in the **Action** column.



A pop-up displays a confirmation message stating: “Saved Search has been removed.” Click the **Confirm** button to delete the saved search. The saved search is removed from the table.



Search Result Fields:

- Display # Items (***options: 10 / 25 / 50 / 100; controls number of entries appearing in the saved search table***)
- Filter (***field is editable; can filter results by keywords entered by the user***)

	Saved Search Headers: • Search Name • Search • Action *Action Buttons:* • Search (***leads to search results)*** • Delete (***remove save search***) *Delete Saved Search Buttons:* • Confirm (***to delete saved search and close pop-up***)

Proposal Manager

Reference Guide

Solicitation Homepage > Solicitation > Solicitation/Offer Tab

Table of Contents

View Solicitation **1**

Solicitation Notifications 2

Attachments 2

Access to Restricted Attachments *2*

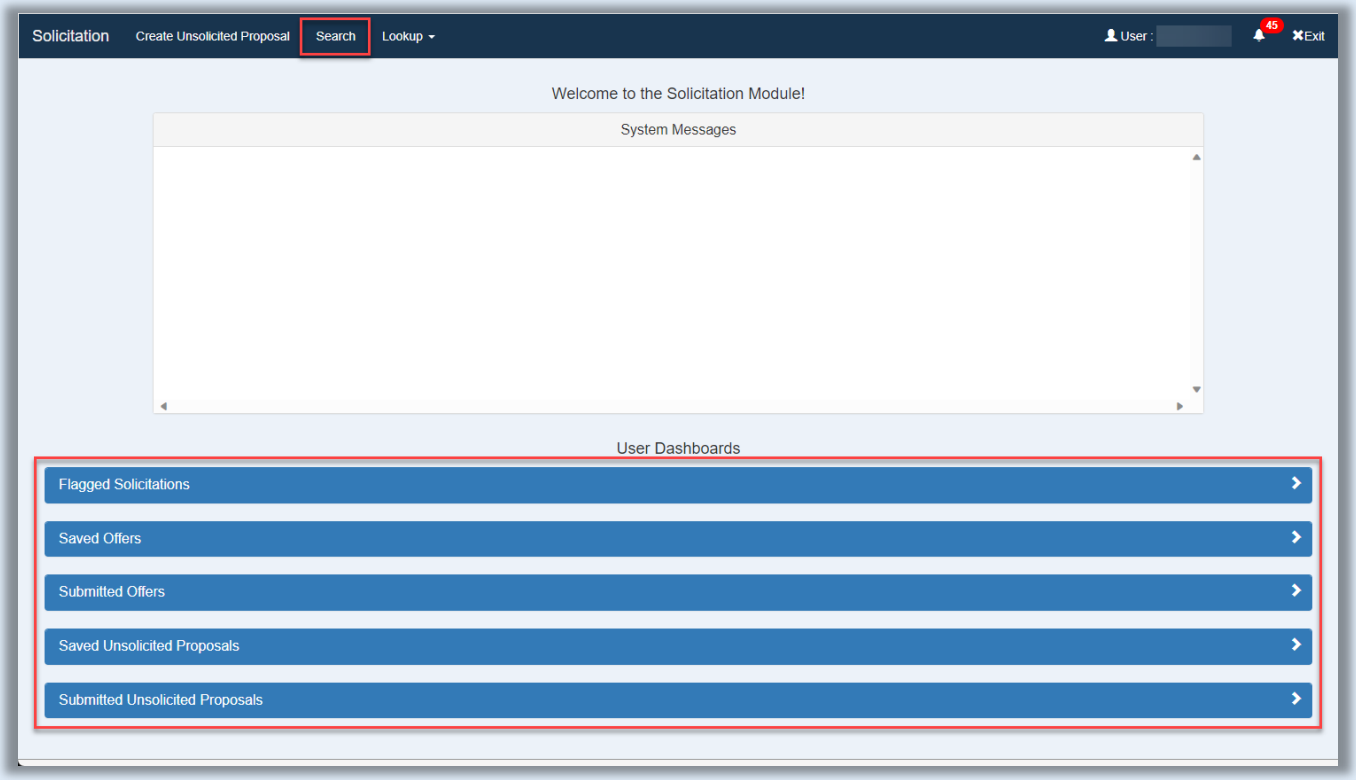
Amendments 3

Create Offer **3**

Withdraw Posted Offer 3

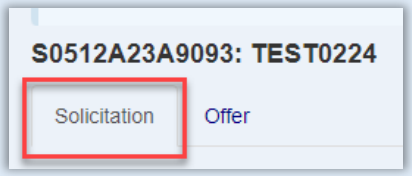
View Solicitation

A Solicitation may be viewed by the Proposal Manager via the dashboard or Search page.



Note: When using the Search form to locate Solicitations, multiple codes may be entered in the **Product or Service** and **NAICS** fields as a comma-delimited list or selected from the Lookup tool.

Upon selecting the Solicitation Number link in the Dashboard or Search results, the user is navigated to the Solicitation page. Solicitation information and Offer details are located on the Solicitation and Offer tabs, respectively.

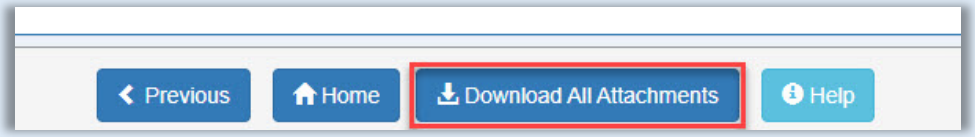


The Solicitation details will be displayed on the **Solicitation** tab with all information as read-only. All attachments on the Solicitation will be located in the Attachments section. The user may view any attachments restricted to their CAGE code.

Solicitation Notifications

The Proposal Manager may request to receive notifications regarding Amendments made to a Solicitation by selecting the checkbox at the top of the Solicitation tab. If the Notice Type of the Solicitation is Presolicitation or Sources Sought, the Proposal Manager will also be notified if the Solicitation is posted as final.

Attachments



The **Download All Attachments** button will complete the download of all attached files to the local directory.

Access to Restricted Attachments

Proposal Managers may request access to restricted attachments on Solicitations and Amendments. To submit a request for access:

1. Select the **Request Access to Restricted Attachments** button in the Attachments section. (This button will not display if there are no restricted attachments or if the Proposal Manager was granted restricted access to all attachments.)
2. On the Restricted Attachment Access Request modal, complete all necessary fields, including Reason for Access Request.
3. Select the **Confirm** button to submit the request.

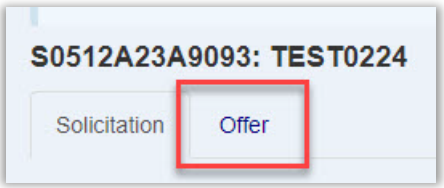
The request will be sent to the Solicitation Manager on the Solicitation for review. If access is granted, the Proposal Manager will be notified via email and system notification of the approval.

Amendments

When viewing a Solicitation with Amendments, Proposal Managers will be provided with a list of Amendments to that Solicitation. Selecting an Amendment link will navigate the user to a page displaying information for that Amendment.

Create Offer

To submit an Offer on an open Solicitation, select the desired Solicitation with Open status via the dashboard or Search page.



Navigate to the Offer tab at the top of the page. Any existing offers will be displayed.

1. Select the **Add** button to begin creating an Offer. The Offer may be saved for completion at a later time by selecting the **Save Offer** button at the bottom of the page.
2. Complete all required fields. If applicable, select the **Alternate Offer** checkbox.
3. Select the **Choose Files** button to select a file(s) from the local directory to attach to the Offer.
    a. If the Solicitation Manager subsequently indicates that all or part of the file is unreadable, the Proposal Manager will be notified by email. The attachment section will then include a link under the Unreadable File column on the Offer tab.
4. Enter the current date in the **Signature Date** field.
5. Select the **Signature** button to post the Offer.
6. The Sign Document modal will be displayed, requiring the user to enter a Digital PIN. If the PIN has not previously been created, select the **Manage Digital PIN** button to complete the process.
7. Select the **Sign and Submit** button to post the Offer. The offer will be displayed on the Offer tab of the Solicitation.

Withdraw Posted Offer

To withdraw a previously posted Offer, navigate to the related Solicitation via the Submitted Offers dashboard or the Search page and select the Solicitation Number link.

1. On the Offer tab, expand the Offer to be withdrawn. The Offer details will display.
2. Select the **Withdraw Offer** button.
3. Select **Yes** on the Withdraw Offer modal to complete the process.

Upon withdrawal of the Offer, the following users will be notified via email and system notifications:

- Solicitation Managers listed on the Solicitation
- Proposal Manager that withdrew the Offer