

# Manage Opportunities Overview

1

Enter opportunity identification data

2

Accomplish the tabs

3

Accomplish the Team Tab subtasks

4

Accomplish the main screen subtasks

FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities

Manage Opportunities New Copy Delete 1 of 1 New Table Query

Identification

Opportunity ID Record Type Manual Exclude from Reports

Name \*

General Status Details/Address

Opportunity Info

Number \*

Short Description \*

Opportunity Roles

Our Role/Responsibility

Prime Contractor

Contract Information

Contract Role/Type

Prime Contract No

Task Order No

Master Contract No Other Contract No

Subcontract No

Contract Vehicle

Primary Work Location

This click-thru introduces opportunities in Contract Management and shows you how to create an opportunity record.

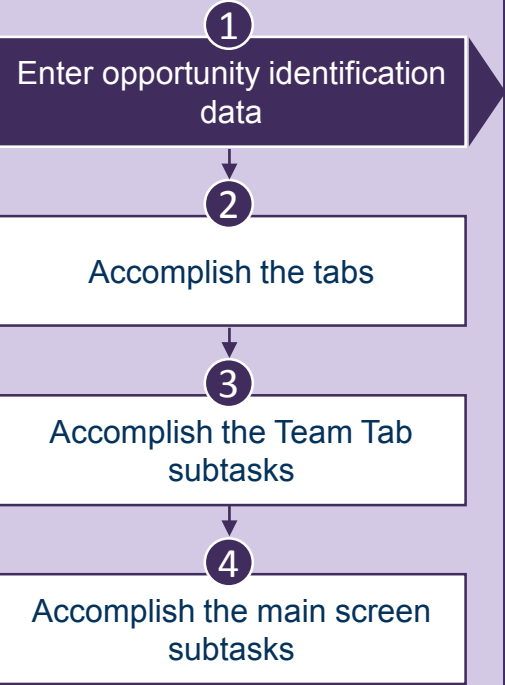
Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Best viewed in IE or Adobe PDF Reader.

# Manage Opportunities Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities

### Manage Opportunities

New Copy Delete 1 of 1 New Table Query

**Identification**

Opportunity ID  Record Type  ☐ Exclude from Reports

Name \*  Record Status \*

**General** Status Details/Addresses RFP Info Team

**Opportunity Info**

Number \*

Short Description \*

**Opportunity Record**

Our Role

Prime Contractor   Type

**Contract Information**

Contract Role/Type

Prime Contract No  Name

Task Order No

Master Contract No  Other Contract No

Subcontract No

Contract Vehicle

Primary Work Location

**Annotations:**

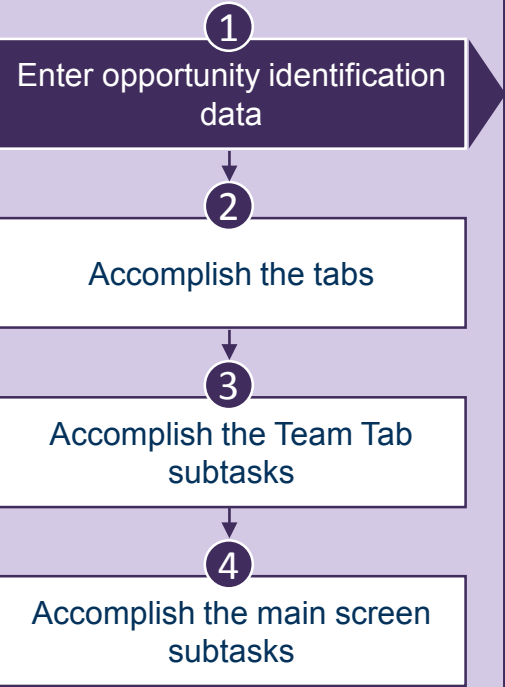
- 1** Enter opportunity identification data
- 2** Accomplish the tabs
- 3** Accomplish the Team Tab subtasks
- 4** Accomplish the main screen subtasks

**A** Enter a unique ID to identify the opportunity.

If the **Auto-assign Opportunity IDs** check box is selected on the Configure Opportunity Settings screen, you can leave this blank and Costpoint automatically assigns an ID.

Follow the steps on the next few slides to enter identification data for the opportunity record.

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Opportunity Info

Number \*Short Description \*

Opportunity Roles

Our Role/ResponsibilityPrime Contractor

Contract Information

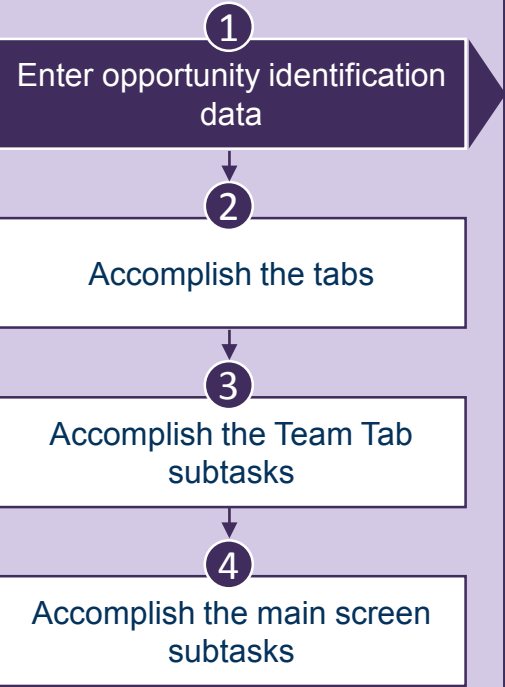
Contract Role/TypePrime Contract NoTask Order NoMaster Contract NoSubcontract NoContract VehiclePrimary Work LocationNameOther Contract No

B

Enter the name of the opportunity.

You can enter a longer name on the Details/Addresses tab. If the opportunity is imported from GovWin IQ, this field defaults to the GovWin IQ opportunity name, but it can be changed.

# Manage Opportunities Overview



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Home Star 1 Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities

### Manage Opportunities

New Copy Delete 1 of 1 New Table Query

**Identification**

Opportunity ID

Name

Record Type **Manual** ☐ Exclude from Reports

Record Status **Active**

**General** Status Details/Add

**Opportunity Info**

Number

Short Description

**Opportunity Roles**

Our Role/Responsibility

Prime Contractor  Type

**Contract Information**

Contract Role/Type

Prime Contract No  Name

Task Order No

Master Contract No  Other Contract No

Subcontract No

Contract Vehicle

Primary Work Location

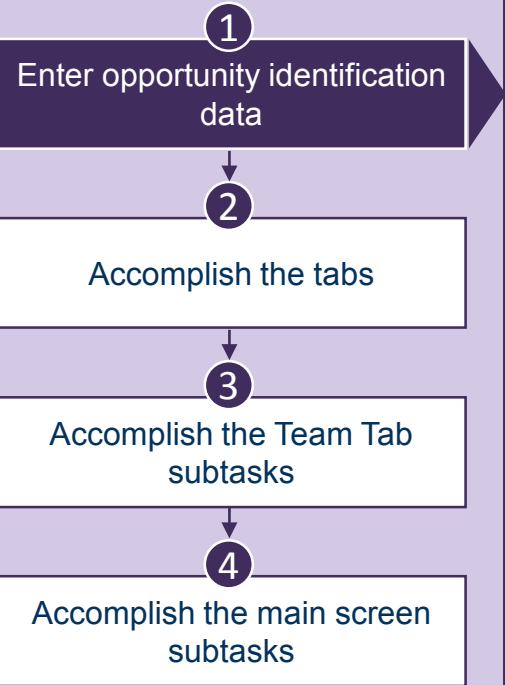
**View the record type. This field is automatically populated by Costpoint.**

**This field displays the record type which can be:**

- Manual** — The record was added on screen.
- GovWin IQ** — The record was added via GovWin IQ integration.

**If you are creating a new record, this displays Manual.**

# Manage Opportunities Overview



FILE LINE OPTIONS PROCESS HELP

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Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities

### Manage Opportunities

New Copy Delete 1 of 1 New Table Query

**Identification**

Opportunity ID  Record Type **Manual** ☐ Exclude from Reports

Name \*  Record Status \* **Active**

**General** Status Details/Addresses RFP Info Team Post-Award Debrief

**Opportunity Info**

Number \*

Short Description \*

**Opportunity Roles**

Our Role/Responsibility

Prime Contractor

**Contract Information**

Contract Role/Type

Prime Contract No  Name

Task Order No

Master Contract No  Other Con

Subcontract No

Contract Vehicle

Primary Work Location

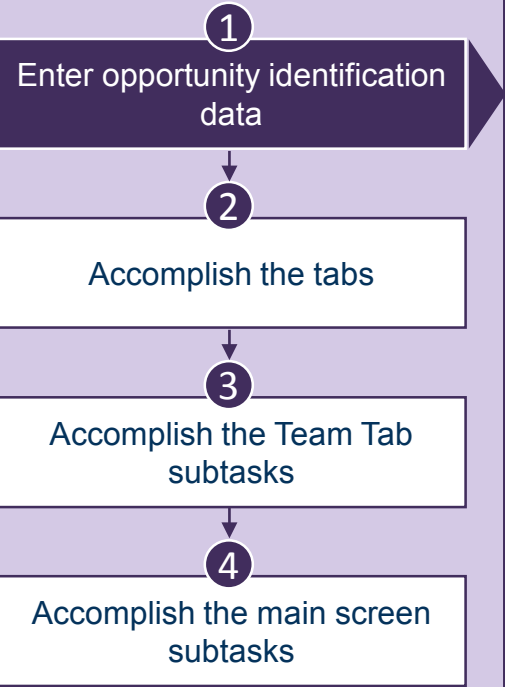
**D** Select the record status of the opportunity. Valid values are **Active** and **Inactive**.

If you select **Inactive**, the opportunity will not be available in the lookup within a contract or subcontract record, but can be manually entered.

In addition, you will not be able to initialize a project from the opportunity on the Project Initialization subtask.

If this opportunity is active and linked to a contract, subcontract, and/or project, and you updated its record status to **Inactive**, the contract, subcontract, and/or project will remain linked to this opportunity.

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award

Opportunity Info

Number \*Short Description \*

Opportunity Roles

Our Role/ResponsibilityPrime ContractorType

Contract Information

Contract Role/TypePrime Contract NoTask Order NoMaster Contract NoSubcontract NoContract VehiclePrimary Work LocationNameOther Contract No

1

Enter opportunity identification data

2

Accomplish the tabs

3

Accomplish the Team Tab subtasks

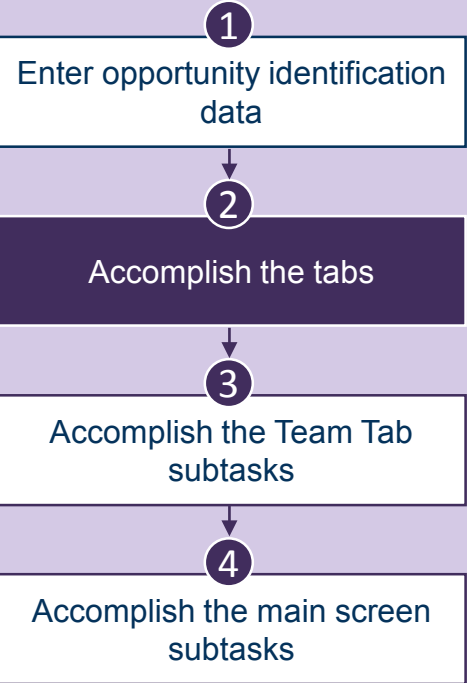
4

Accomplish the main screen subtasks

E

Select this check box to exclude the opportunity from reports available in the Contracts domain.

# Manage Opportunities Overview



FILE LINE OPTIONS PROCESS HELP

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### Manage Opportunities

New Copy Delete 1 of 1 New Table Query

**Identification**

Opportunity Number \*

Name \*

☐ Exclude from Reports

**General** Status Details/Addresses RFP Info Team Post-Award Debrief

**Opportunity Info**

Number \*

Short Description \*

**Opportunity Role**

Our Role

Prime Contractor   Type

**Contract Information**

Contract Role/Type

Prime Contract No  Name

Task Order No

Master Contract No  Other Contract No

Subcontract No

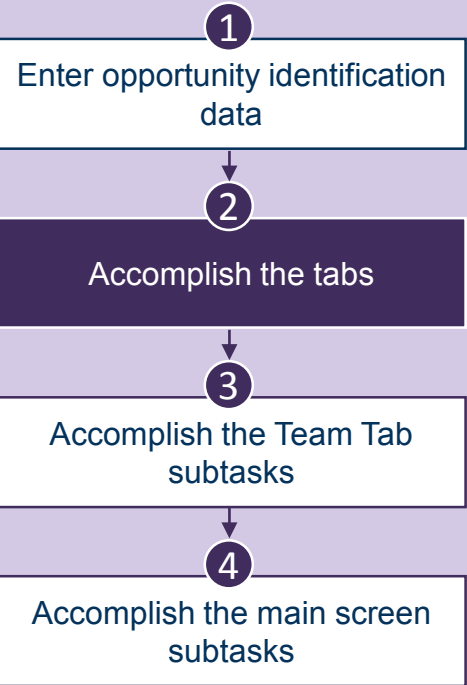
Contract Vehicle

Primary Work Location

Use this tab to specify the opportunity number and short description, and to enter information for contracts, agencies, and business units that you want to link to the opportunity.

Follow the steps on the next slides to accomplish the tabs.

# Manage Opportunities Overview



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Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Opportunity Info

Number \*Short Description \*

Opportunity Roles

Our Role/RespoPrime Contractor

Contract Information

Contract Role/TypePrime Contract NoTask Order NoMaster Contract NoOther Contract NoSubcontract NoContract VehiclePrimary Work Location

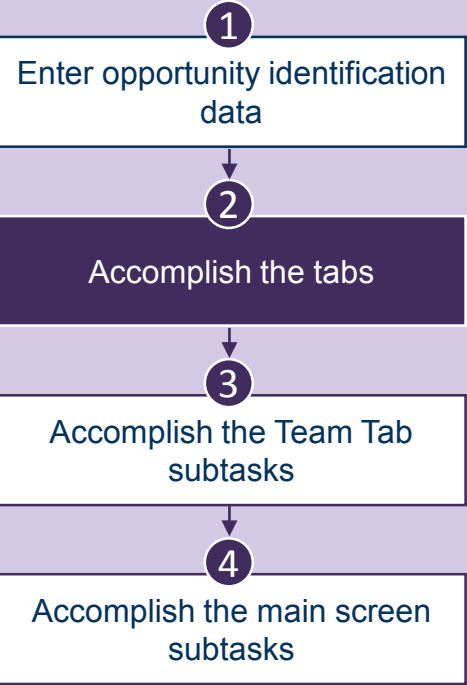
B

Enter the opportunity's identifying number and description from its source.

If the opportunity is imported from GovWin IQ, these fields display the GovWin IQ opportunity number and short description, but these can be changed.



# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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UserHomePower

Manage Opportunities

NewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity Name \*

C

Use this tab to specify opportunity status details, key dates, value of the opportunity, probability of winning the opportunity, and organizational conflict of interest (OCI) status.

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Opportunity Status

Stage \*

Date Changed \*01/21/2019

Type

Source

NAICS (primary)

NAICS (supporting)

Website

Estimated Start Date (contract)

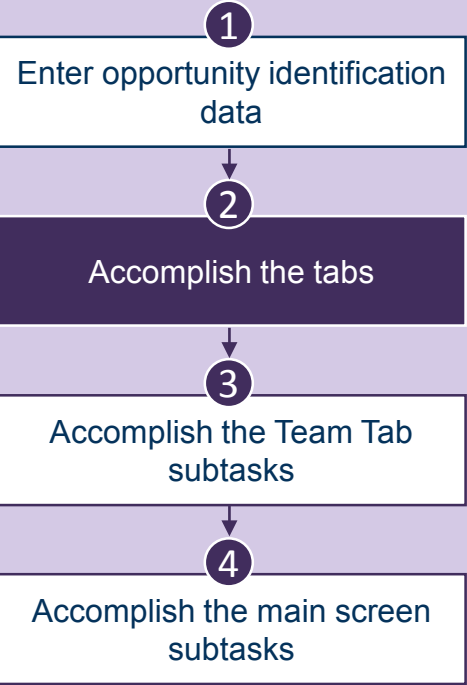
Contract Period of Performance Months

Estimated Completion Date

Notes

Value and Key Dates

# Manage Opportunities Overview



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### Manage Opportunities

Identification

Opportunity ID

Name

General Status Details/Addresses RFP Info Team

Opportunity Status

Stage

Date Changed

Type

Source

NAICS (primary)

NAICS (supporting)

Website

Estimated Start Date (contract)

Estimated Completion Date

Notes

Contract Period of Performance Months

Value and Key Dates

The valid values for this field are those that exist on the Manage Opportunity Stages screen. Codes that display in the lookup have the **Show in Lookup** check box selected in Manage Opportunity Stages. Only codes that are available in the lookup can be used for new records in Manage Opportunities.

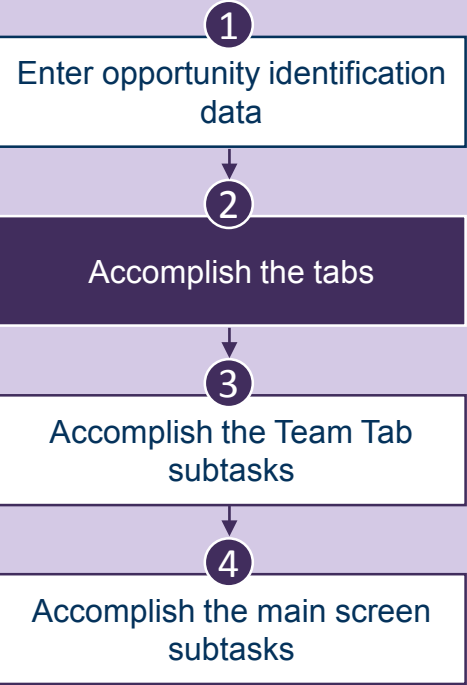
The unlabeled field to the right displays the description of the opportunity stage code.

This field displays the date on which the stage code for the opportunity was changed, but it can be changed.

Enter, or click lookup to select, the opportunity stage.

Enter, or click calendar to select, the date the opportunity was changed.

# Manage Opportunities Overview



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Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDName \*FEnter relevant information on the Details/Addresses tab.

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Additional Details

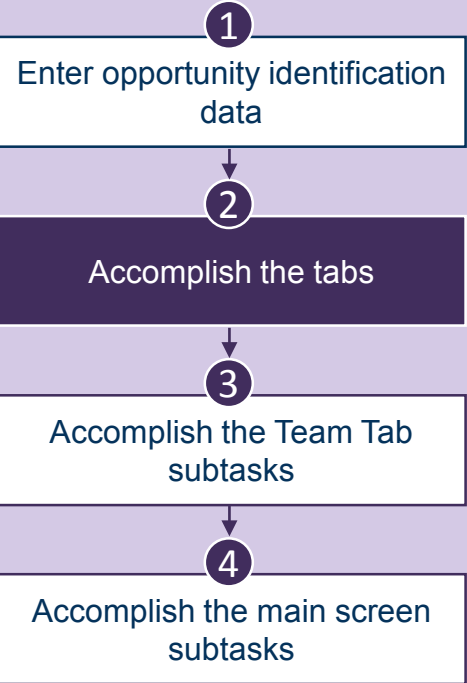
Long NameFull DescriptionKey words

Label 1Label 2Label 3Label 4Label 5Label 6Label 7Label 8Label 9Label 10

Addresses

Agency NamePrimary Agency/CustomerAcquisition Agency/CustomerPrime Contractor

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeam

Additional Details

Long NameFull Description

Enter the values in the Label fields if required.

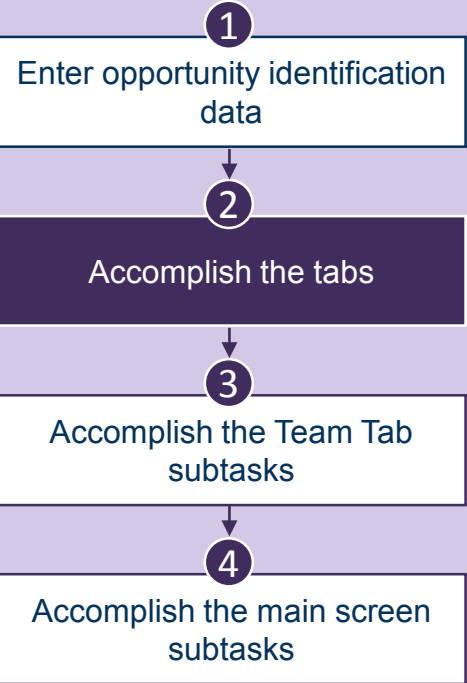
Label 1Label 2Label 3Label 4Label 5Label 6Label 7Label 8Label 9Label 10

Addresses

Primary Agency/CustomerAcquisition Agency/CustomerPrime Contractor

Agency Name

# Manage Opportunities Overview



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Identification

Opportunity IDName\*

Enter relevant information on the RFP Info tab.

Use this tab to enter and track key milestone dates for the opportunity and identify contract provisions.

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Key Milestones

RFI Date		Subc Kickoff		Proposal Due Date	
Draft RFP Due Date		Pink Team Review		BAFO Date	
Expected RFP Release		Red Team Review		Award Date	
Bidders Conference		Gold Team Review		RFP Date 12	

Provisions

<input type="checkbox"/> Teaming Agreement	<input type="checkbox"/> Hiring Restrictions
<input type="checkbox"/> Subcontract Plan Submitted	Hiring Restriction Remarks
<input type="checkbox"/> DD254 Required	
<input type="checkbox"/> Service Contract Act	Hiring Restriction Status
<input type="checkbox"/> Davis Bacon Act	Set Asides

Details

☐ Request Bid & Proposal Project Setup Notify |  |  |

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

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Manage Opportunities

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Identification

Opportunity ID

Name \*

Record TypeManual

Record Status \*Active

Exclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Key Milestones

RFI Date		Subc Kickoff		Proposal Due Date	
Draft RFP Due Date		Pink Team Review		BAFO Date	
Expected RFP Release		Red Team Review		Award Date	
Bidders Conference		Gold Team Review		RFP Date 12	

Provisions

Enter the values in the RFP Date fields if required.

The labels of these fields default from the RFP Date 1 to RFP Date 12 names set up on the Configure Opportunity Settings screen.

The Configure Opportunity Settings screen allows for optional setup of these fields to be required based on the stage and sequence of the stage of the opportunity record.

The sequence of stages is set up on the Manage Opportunity Stages screen.

Details

Request Bid & Proposal Project Setup

Notify

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

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Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDName\*Exclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentDebrief OfficerDebrief DateDebrief AttendeesLessons Learned

ResultLossReason

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

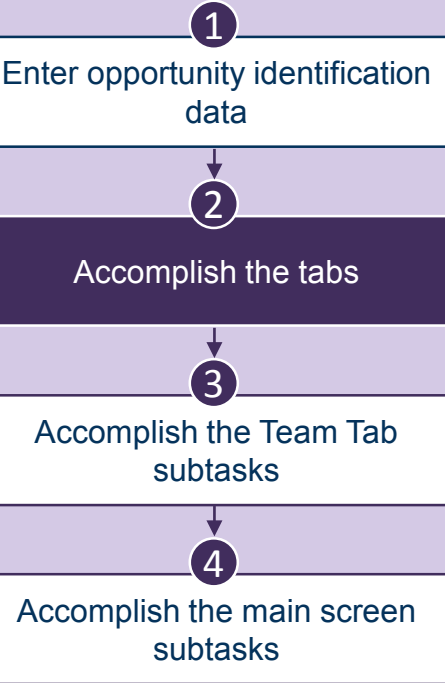
Enter relevant information on the Post-Award Debrief tab.

Use this tab to specify post-award debrief information whether you win or lose the contract.

Post-award debriefings are required under the Federal Acquisition Regulation (FAR). In post-award debriefings, the government may provide you information on the weaknesses or deficiencies in your proposal, overall ranking of offerors, and other technical details that do not include trade secrets or confidential information of offerors.

You can use this tab to indicate the result of the awarding process, the loss reason if you did not win the award, and any other information you can use for loss analysis.

# Manage Opportunities Overview



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UserHomePower

Manage Opportunities

Identification

Opportunity ID  
Name \*

K

Enter relevant information on the Team tab.

Use this tab to identify the employees, prime contractors, and/or subcontractors who are working or will possibly work on the opportunity. You can also specify competitors against an opportunity.

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

1 of 1 New

Opportunity Employee TeamPotential Work Force EmployeesOpportunity Teammates/Competitors

Team > Opportunity Employee Team

Employee *	Name	Title	Role Description
------------	------	-------	------------------

Close

Team > Potential Work Force Employees

Employee *	Name	Title	Role Description	Include in Work Force	ITAR	U.S. Citizen
...						

Close

Team > Opportunity Teammates/Competitors

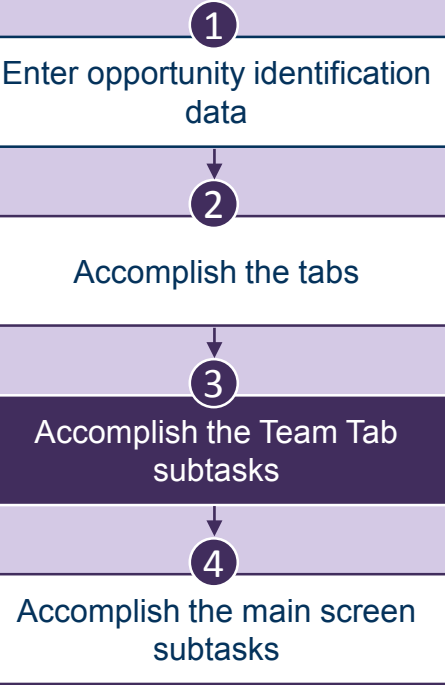
Teammate/Competitor *	Type *	ID *	Name	Role Description	Include in Wo
...					

Vendor Employees

Close



# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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1

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Manage Opportunities

1 of 1 New

Identification

Opportunity IDName \*Record TypeManualRecord Status \*ActiveExclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Team > Opportunity Employee Team

		Role Description
<input checked="" type="checkbox"/>	E	

Close

Team > Potential Work Force Employees

		Role Description	Include in Work Force	ITAR	U.S. Citizen
<input checked="" type="checkbox"/>	E				

Close

Team > Opportunity Teammates/Competitors

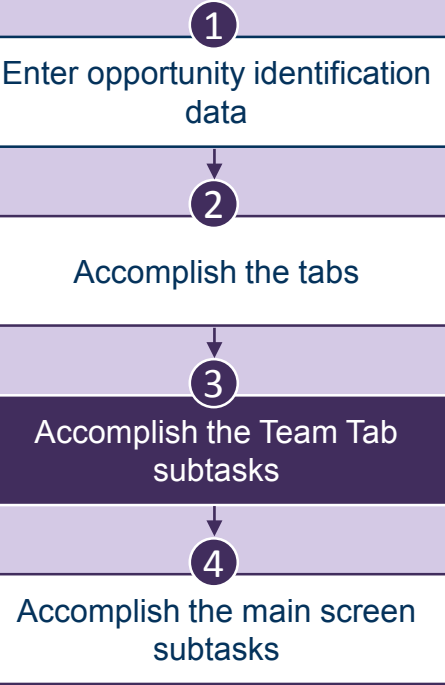
	Teammate/Competitor *	Type *	ID *	Name	Role Description	Include in Wo
<input checked="" type="checkbox"/>						

Close

Vendor Employees

Close

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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Manage Opportunities1 of 1 New

Identification

Opportunity IDRecord TypeManualRecord StatusActiveExclude from Reports

Use the Opportunity Employee Team subtask to associate one or more employees with the opportunity and define their roles.

Complete the Opportunity Employee Team subtask. Click **New** to start adding an employee.

Team > Opportunity Employee Team

Employee *	Name	Title	Role Description
------------	------	-------	------------------

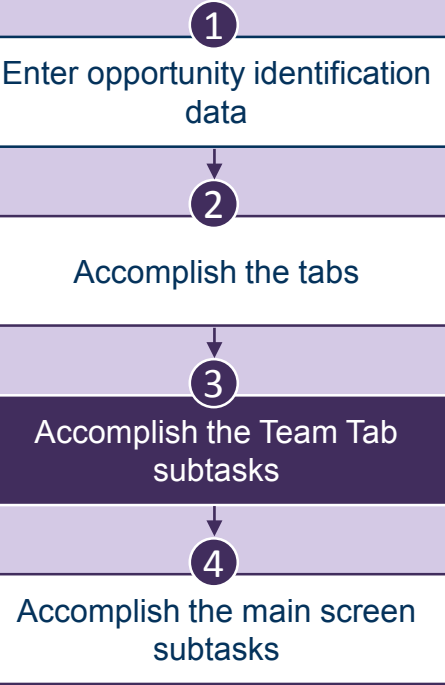
NewDelete1 of 1 New

Link Force EmployeesOpportunity Teammates/Competitors

NewCopyDeleteQuery

Close

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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Manage Opportunities1 of 1 New

Identification

Record TypeManualExclude from Reports

Record Status \*Active

Post-Award

Complete the Potential Work Force Employees subtask. Click **New** to add a line.

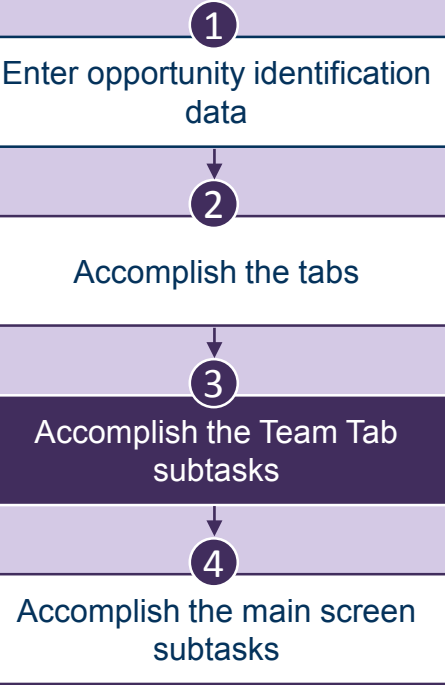
Team > Potential Work Force Employees

NewDeleteQuery

Employee *	Name	Title	Role Description	Include in Work Force	ITAR	U.S. Citizen

Close

# Manage Opportunities Overview



FILELINEOPTIONSPROCESSHELP

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HomeStar1

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UserAppPower

Manage Opportunities

1 of 1 New

Record TypeManual☐ Exclude from Reports

Record Status \*Active

Post-Award

1 of 1 New

Link Force Employees

Opportunity Teammates/Competitors

Team > Opportunity Teammates/Competitors

NewCopyDeleteQuery

CC

<input checked="" type="checkbox"/>	Teammate/Competitor *	Type *	ID *	Name	Role Description	Include in Wo

Vendor Employees

Close

Use the Opportunity Teammates/Competitors subtask to associate one or more prime contractors, subcontractors, and/or competitors with the opportunity and define their roles. You can assign the same role to multiple contractors/subcontractors/competitors.

Complete the Opportunity Teammates/Competitors subtask. Click **New** to add a line.

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Manage Opportunities

1 of 1 New

Identification

Opportunity IDName \*Record TypeManualRecord Status \*ActiveExclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Team > Opportunity Teammates/Competitors

Teammate/Competitor	Type *	ID *	Name
Subcontractor			

Vendor Employees

NewCopyDeleteQuery

Vendor ID	Type	Vendor Name	Role Description
-----------	------	-------------	------------------

Close

Opportunity Employee Team

Teammates/Competitors

Subcontractor

Vendor Employees

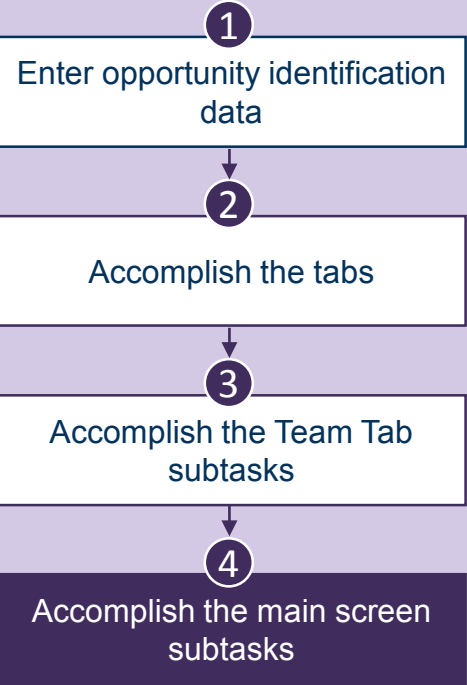
New

Team > Opportunity Teammates/Competitors > Vendor Employees

On the Vendor Employees subtask, click **New** to start adding vendor employees.

Use the Vendor Employees subtask to enter and maintain information for vendor employees who will work on the subcontract when the opportunity is won and a project and a contract are linked to the opportunity.

# Manage Opportunities Overview



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➔ Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentDebrief OfficerDebrief DateDebrief AttendeesLessons Learned

Follow the steps on the next slides to accomplish the subtasks of the main screen.

These subtasks display on all tabs except the Team tab.

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

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Manage Opportunities

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Identification

Opportunity IDName\*

Record TypeManualRecord Status\*Active

☐ Exclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentDebrief OfficerDebrief DateDebrief AttendeesLessons Learned

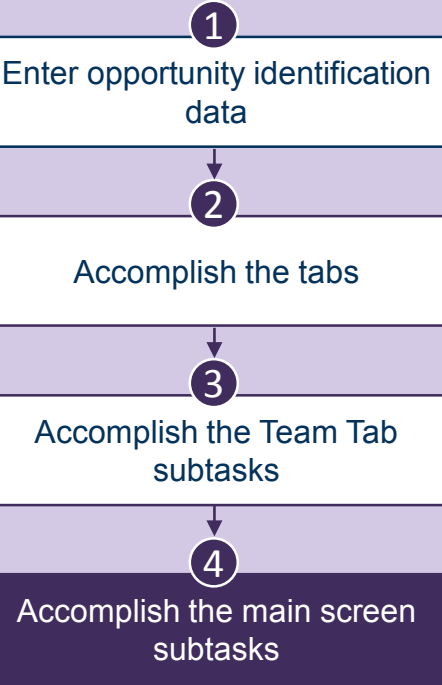
ResultLoss ReasonLoss Comments

A

Click this link to open the User Defined-Info subtask.

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

# Manage Opportunities Overview



Home

Star

1

Browse Applications > Contracts > Opportunities > Manage Opportunities

Deltek Costpoint

Manage Opportunities

New Copy Delete 1 of 1 New Table Query

Identification

Opportunity ID Name \* Record Type Manual Record Status \* Active Exclude from Reports

General Status Details/Addresses RFP Info Team Post-Award Debrief

Debrief Document Debrief Officer Debrief Date Debrief Attendees

Result Loss Reason Loss Comments

Use the User-Defined Info subtask to enter, edit, and view values for user-defined fields for an opportunity.

You set up these fields on the Manage Opportunity User-Defined Labels screen. If you use user-defined information for opportunities, use this subtask to enter that information when you add a new opportunity or when you need to change that information for an existing opportunity.

Click **New** to add a new line, or click **Autoload** to automatically populate the User-Defined Info subtask with data available on the Manage Opportunity User-Defined Labels screen.

User-Defined Info Contracts Subcontracts Organizational Conflict of Interest (OCI) Records Projects Linked Activities Documents Project Initialization GovWin IQ

Manage Opportunities > User-Defined Info

New Copy Delete Form Query

Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
-----------	----------	------------	---------------	------------	----------------------------	----------------	----------

Autoload

Close



# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

Home

Star

1

Browse Applications > Contracts > Opportunities > Manage Opportunities

Delttek Costpoint

Manage Opportunities

New Copy Delete 1 of 1 New Table Query

Identification

Opportunity ID Record Type Manual Exclude from Reports

Name \* Record Status \* Active

General

Status

Details/Addresses

RFP Info

Team

Post-Award Debrief

Debrief Document

Debrief Officer

Debrief Date

Debrief Attendees

Lessons Learned

Result

Loss Reason

Loss Comments

C

If you click **New** instead of **Autoload**, enter relevant information on this subtask.

Enter the **Data Type** for the user-defined label, which can be text, numeric, or date. If **Required** is Y, you must enter a value in either **Text Value**, **Numeric Value**, or **Date Value** before you can save the record on this subtask.

Manage Opportunities > User-Defined Info

New Copy Delete Form Query

	Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
→								

Autoload

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

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Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

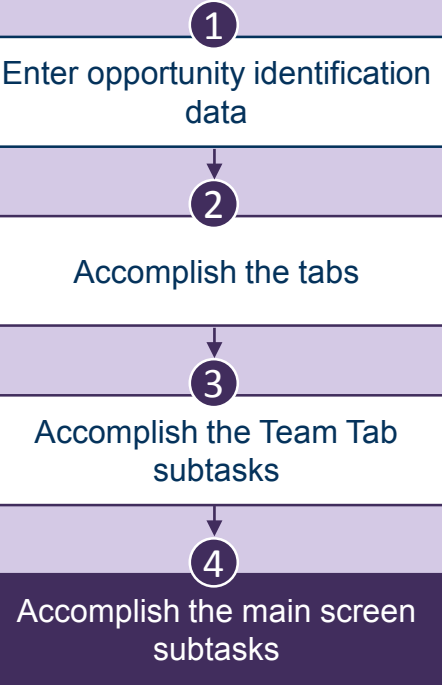
GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResultDebrief OfficerDebrief DateLoss ReasonDebrief AttendeesLoss CommentsLessons Learned

Click this link to open the Contracts subtask.

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

# Manage Opportunities Overview



### Manage Opportunities

Identification

Opportunity ID

OPP-0000000000000001

Record Type

Manual

☐ Exclude from Reports

Name \*

CIO-SP3-TO1-HHS IT O&M

Record Status \*

Active

General

Status

Details/Addresses

RFP Info

Team

Post-Award Debrief

Debrief Document

Award Status.pdf

Result

Opportunity was won but there was a struggle to meet the final deadline

Debrief Officer

John Graffe

Loss Reason

Debrief Date

05/27/2017

Loss Comments

Debrief Attendees

Seth Stapleford  
Jennifer Martin

Lessons Learned

We need to have tighter project tracking proposal that could have been highlighted tight deadline.

E

Use the Contracts subtask to view contracts associated with the opportunity.

All field values on this subtask default from the Manage Contracts screen and cannot be edited. Contracts are linked to opportunities through the **Main Opportunity ID** field and Additional Opportunities subtask on the Manage Contracts screen. An opportunity may also be linked to a contract if the opportunity master contract number, other contract number, subcontractor number, or task order number exists in the Contract Master (CNTR\_MASTER) record as a prime contract, master contract, subcontract, or task order number.

Multiple contract records can be associated with a single opportunity.

User-Defined Info

Contracts

Subcontracts

Organizational Conflict of Interest (OCI) Records

Projects Linked

Activities

Documents

Project Initialization

GovWin IQ

Manage Opportunities > Contracts

Form Query

	Contract ID	Contract Name	Prime Contract ID	Company ID	Contract Status	Contract Type	Anticipated Contract Value	Contract Award Date
<input checked="" type="checkbox"/>	<a href="#">CNTR-0000000000000008</a>	HHS IT Ops & Maint Svcs	HHSN847351200567W	10	Awarded	Time & Materials	11,853,225.32	05/27/2017
<input type="checkbox"/>	<a href="#">CNTR-0000000000000009</a>	Karen Contract		10	Awarded	Cost (No Fee) Contract	1,000,000.00	05/27/2017

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

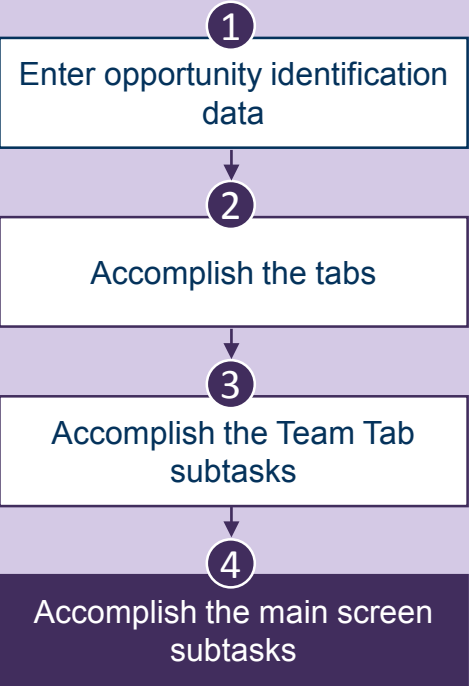
GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResultDebrief OfficerDebrief DateLoss ReasonDebrief AttendeesLoss CommentsLessons Learned

FClick this link to open the Subcontracts subtask.

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

# Manage Opportunities Overview



### Manage Opportunities

at Deltak Costpoint

Identification

Opportunity ID OPP-0000000000000001

Name \* CIO-SP3-TO1-HHS IT O&M

Record Type Manual

Exclude from Reports

Record Status \* Active

General Status Details/Addresses RFP Info Team Post-Award Debrief

Debrief Document Award Status.pdf

Debrief Officer John Graffe

Debrief Date 05/27/2017

Debrief Attendees Seth Stapleford  
Jennifer Martin

Lessons Learned We need to have tighter project tracking controls in place to ensure we meet the dates outlined. A few deliverables we late on the technical proposal that could have been highlighted and addressed earlier in the process. This cascaded down to other teams who were already working on tight deadline.

Result Opportunity was won but there was a struggle to meet the final deadline

Loss Reason

Loss Comments

Use the Subcontracts subtask to view the subcontracts associated with the opportunity.

The **Subcontract ID** is linked to the subcontract record found on the Manage Subcontracts screen.

User-Defined Info Contracts Subcontracts Organizational Conflict of Interest (OCI) Records Projects Linked Activities Documents Project Initialization GovWin IQ

Manage Opportunities > Subcontracts

Form Query

	Subcontract ID	Subcontract Name	Agreement Type	Status	Subcontract Start Date	Subcontract End Date	Subcontractor/Vendor ID	Subcontractor/Vendor Name
<input checked="" type="checkbox"/>	<a href="#">SUBC-0000000000000001</a>	HHS-Balmar-Subc-0001	Subcontractor Agreement	Awarded	06/01/2017	05/31/2022	V100013	Balmar Consulting
	<a href="#">SUBC-0000000000000002</a>	HHS-Premier-Subc-0001	Subcontractor Agreement	Awarded	06/01/2017	05/31/2022	V100089	Premiere Solutions

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

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Accomplish the Team Tab subtasks

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Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResultDebrief OfficerDebrief DateLoss ReasonDebrief AttendeesLoss CommentsLessons Learned

HClick this link to open the Organizational Conflict of Interest (OCI) Records subtask.

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

Identification

Opportunity ID

OPP-0000000000000001

Record Type

Manual

☐ Exclude from Reports

Name \*

CIO-SP3-TO1-HHS IT O&M

Record Status \*

Active

General

Status

Details/Addresses

RFP Info

Team

Post-Award Debrief

Debrief Document

Award Status.pdf

Result

Opportunity was won but there was a struggle to meet the final deadline

Debrief Officer

John Graffe

Loss Reason

Debrief Date

05/27/2017

Loss Comments

Debrief Attendees

Seth Stapleford  
Jennifer Martin

Lessons Learned

We need to have tighter project tracking controls in place to ensure we meet the dates outlined. A few deliverables we late on the technical proposal that could have been highlighted and addressed earlier in the process. This cascaded down to other teams who were already working on tight deadline.

Use this subtask to view the OCIs associated with the opportunity.

With this subtask, you can get a full list of all organization conflicts of interest related to the opportunity, and consider this information when deciding to bid on the opportunity. All values on this subtask default from the Manage Organizational Conflict of Interest (OCI) screen and cannot be edited.

User-Defined Info

Contracts

Subcontracts

Organizational Conflict of Interest (OCI) Records

Projects Linked

Activities

Documents

Project Initialization

GovWin IQ

Manage Opportunities > Organizational Conflict of Interest (OCI) Records

Form

Query

	OCI ID	OCI Name	Prime Contract No	Master Contract No	OCI Clear Date	Clear Date Review Status	Unequal Access	Biased	Im
<input checked="" type="checkbox"/>	<a href="#">OCI-0000000000000008</a>	Impaired Objectivity	W56HZV-05-C-1112		12/31/2013		<input type="checkbox"/>	<input type="checkbox"/>	
	<a href="#">OCI-0000000000000012</a>	HHS - Personal Col		HHSN847381200567W		Cleared	<input type="checkbox"/>	<input type="checkbox"/>	
	<a href="#">OCI-0000000000000016</a>	Applied Technologies Inc Company1					<input type="checkbox"/>	<input type="checkbox"/>	

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

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Accomplish the Team Tab subtasks

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Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDName \*Record TypeManualRecord Status \*ActiveExclude from Reports

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

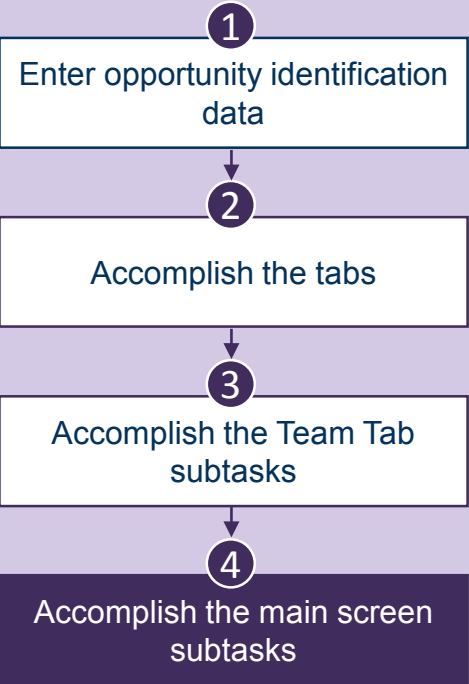
Debrief DocumentDebrief OfficerDebrief DateDebrief AttendeesLessons LearnedResultLoss ReasonLoss Comments

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

Click this link to open the Projects Linked subtask.



# Manage Opportunities Overview



General Status Details/Addresses RFP Info Team Post Award Debrief

Debrief Document: Award Status.pdf Result: Opportunity was won but there was a struggle to meet the final deadline

Debrief Officer: John Graffe

Debrief Date: 05/27/2017

Debrief Attendees: Seth Stapleford, Jennifer Martin

Lessons Learned: We need to have tighter project tracking controls in place proposal that could have been highlighted and addressed tight deadline.

**K** Use the Projects Linked subtask to view information about the projects linked to the opportunity.

To track the costs associated with an opportunity (bid and proposal costs), you can use the Project Initialization subtask on the Manage Opportunities screen to create projects and link these projects to the opportunity.

All fields are read-only, but you can do the following on the Projects Linked subtask:

- Click the project link to open the Manage Project User Flow screen and access additional information about the project.
- Limit the projects that display on the table window through the expand and collapse options.
- Preview or print project reports for the selected project.

User-Defined Info Contracts Subcontracts Organizational Conflict of Interest (OCI) Records Projects Linked Activities Documents Project Initialization GovWin IQ

### Project Status Report

To view or print Project Reports, highlight the Project you'd like to see, and click on Print Preview or Print icon at the top of the page. You can use Print Setup to change how and where the report prints.

[Manage Opportunities](#) > [Projects Linked](#) Query ▼

Expand All Collapse All

	Project	Project Link	Project Name	Project Manager	Project Classification	Project Type	Total Contract Value	Total Funded Value	Total Contract Opportunity Value	Total Funded Opportunity Value
+	10008	<a href="#">10008</a>	961390	Anderson, Eve	DIRECT PROJECT	GOVERNMENT	0.00	0.00	0.00	0.00
+	10115	<a href="#">10115</a>	HHS IT Ops & Maint B/4	Sexton, Tina	DIRECT PROJECT	GOVERNMENT	11,853,225.31	2,145,135.06	11,853,225.31	2,145,135.06

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

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FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from Reports

Name \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResult

Debrief Officer

Debrief DateLoss Reason

Debrief AttendeesLoss Comments

Lessons Learned

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

Click this link to open the Activities subtask.

# Manage Opportunities Overview

1  
Enter opportunity identification data

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Accomplish the tabs

3  
Accomplish the Team Tab subtasks

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Accomplish the main screen subtasks

Deltek Costpoint

Manage Opportunities > Activities

User-Defined Info

Contracts

Subcontracts

Organizational Conflict of Interest (OCI) Records

Projects Linked

Activities

Documents

Project Initialization

GovWin IQ

New

Copy

Delete

1 of 1 New

Table

Query

Activity ID

Subject

Location

Method

Activity Date

M

Enter relevant information on this subtask.

Completed

Primary Contacts

Activity Owner

Customer

Primary Contact

Business #

Other Attendees

Here, you can schedule and manage milestones, meetings or touchpoints, phone calls, and other tasks related to the opportunity.

Activity Notes

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

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Accomplish the tabs

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Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

Deltek Costpoint

Manage Opportunities > Activities

User-Defined Info

Contracts

Subcontracts

Organizational Conflict of Interest (OCI) Records

Projects Linked

Activities

Documents

Project Initialization

GovWin IQ

New

Copy

Delete

1 of 1 New

Table

Query

Activity

Activity ID

Subject

Location

Method

Activity Date

Completed

Select this check box only when the activity has been completed.

Primary Contacts

Activity Owner

Customer

Primary Contact

Business #

Other Attendees

All fields are optional on this subtask. Note, however, that when you select the **Completed** check box, you will not be able to delete or modify this activity record.

Activity Notes

Close

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

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Accomplish the Team Tab subtasks

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Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from Reports

Name \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResult

Debrief Officer

Debrief DateLoss Reason

Debrief AttendeesLoss Comments

Lessons Learned

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

Click this link to open the Documents subtask.

# Manage Opportunities Overview

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Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

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Accomplish the main screen subtasks

Deltek Costpoint

Manage Opportunities

New Copy Delete 1 of 1 Existing Table Query

Identification

Opportunity ID OPP-0000000000000001

Record Type Manual ☐ Exclude from Reports

Name \* CIO-SP3-TO1-HHS IT O&M

Record Status \* Active

General Status Details/Addresses RFP Info Team Post-Award Debrief

Debrief Document Award Status.pdf

Debrief Officer John Graffe

Debrief Date 05/27/2017

Debrief Attendees Seth Stapleford  
Jennifer Martin

Lessons Learned We need to have tighter project tracking controls in place to ensure we meet the dates outlined. A few deliverables we late on the technical proposal that could have been highlighted and addressed earlier in the process. This cascaded down to other teams who were already working on tight deadline.

Result Opportunity was won but there was a struggle to meet the final deadline

Loss Reason

Loss Comments

User-Defined Info Contracts Subcontracts Organizational Conflict of Interest (OCI) Activities Documents Project Initialization GovWin IQ

Manage Opportunities > Documents

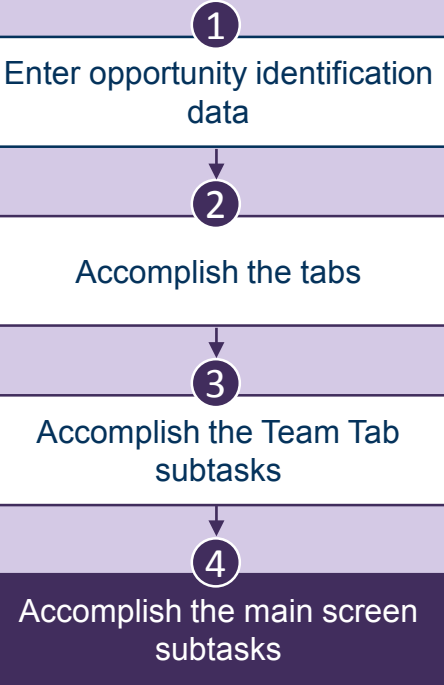
New Copy Delete Query

Document ID *	Date Received	Document Type	File Location	File Name

View Document  
Close

Click **New** to add a new line.

# Manage Opportunities Overview



Manage Opportunities

New Copy Delete 1 of 1 Existing Table Query

Identification

Opportunity ID OPP-0000000000000001 Record Type Manual Exclude from Reports

Name \* CIO-SP3-TO1-HHS IT O&M Record Status \* Active

General Status Details/Addresses RFP Info Team Post-Award Debrief

Debrief Document Award Status.pdf Result Opportunity was won but there was a struggle to meet the final deadline

Debrief Officer John Graffe

Debrief Date 05/27/2017 Loss Reason

Debrief Attendees Seth Stapleford Jennifer Martin Loss Comments

Lessons Learned We need to have tighter project tracking controls in place to ensure we meet the dates outlined. A few deliverables we late on the technical proposal that could have been highlighted and addressed earlier in the process. This cascaded down to other teams who were already working on

Conflict of Interest (OCI) Records Projects Linked Activities Documents Project Initialization GovWin IQ

Manage Opportunities > Documents New Copy Delete Query View Document

Document ID *	Date Received	Document Type	File Location	File Name

Enter a unique **Document ID** to identify the opportunity document record. Also enter or select the **File Location** of the document you want to assign to the opportunity. You can also specify the date the document was reviewed, the document type, file name, and document description.

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

Manage Opportunities

Deltak Costpoint

Identification

Opportunity ID OPP-000000000000001

Record Type Manual

☐ Exclude from Reports

Name \* CIO-SP3-TO1-HHS IT O&M

Record Status \* Active

General

Status

Details/Addresses

RFP Info

Team

Post-Award Debrief

Debrief Document Award Status.pdf

Debrief Officer John Graffe

Debrief Date 05/27/2017

Debrief Attendees Seth Stapleford  
Jennifer Martin

Lessons Learned We need to have tighter project tracking controls in place to ensure we meet the dates outlined. A few deliverables we late on the technical proposal that could have been highlighted and addressed earlier in the process. This cascaded down to other teams who were already working on tight deadline.

Result Opportunity was won but there was a struggle to meet the final deadline

Loss Reason

Loss Comments

User-Defined Info

Contracts

Subcontracts

Organizational Conflict of Interest (OCI) Records

Projects

Manage Opportunities > Documents

Document ID *	Date Received	Document Type	File Location
→ 12345678		Contract Brief	CONTRACTMGMT

R

View Document

Close

Click **View Document** to download the document. Upon clicking this button, you will see a prompt asking if you want to open or save the document.



# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from ReportsName \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResultDebrief OfficerDebrief DateLoss ReasonDebrief AttendeesLoss CommentsLessons Learned

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

Click this link to open the Project Initialization subtask.

Deltek Costpoint >

Use the Project Initialization subtask to create projects and link these projects to the opportunity. This subtask is also available as a subtask of Manage Contracts (Project Initialization subtask).

Click **New** to start adding a project.

T

[Manage Opportunities](#) > Project Initialization

Parameter ID *	Description *

**- Selection Ranges**

Option	Start	End
Template Project *		
Destination Project *		

Number of Projects:

**- Options**

**- Project**

- ☐ Include Basic Info
- ☐ Include Lower Levels

**- Include**

- Project Org Account
- Project Revenue Setup
- Override Fee on Burden
- Override Fee on Direct
- Project Billing Info

**Autoload**

[Details](#)

**Close**

---

**Manage Opportunities > Project Initialization > Details**

Template Project	Destination Project *	Destination Project Name *	Destination Project Abbrev	Active	Owning Organization *

**Close**

# Manage Opportunities Overview

1  
Enter opportunity identification data

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Accomplish the tabs

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Accomplish the main screen subtasks

FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

HomeStar1Browse Applications > Contracts > Opportunities > Opportunities > Manage OpportunitiesUserHomePower

Manage OpportunitiesNewCopyDelete1 of 1 NewTableQuery

Identification

Opportunity IDRecord TypeManualExclude from Reports

Name \*Record Status \*Active

GeneralStatusDetails/AddressesRFP InfoTeamPost-Award Debrief

Debrief DocumentResult

Debrief Officer

Debrief DateLoss Reason

Debrief AttendeesLoss Comments

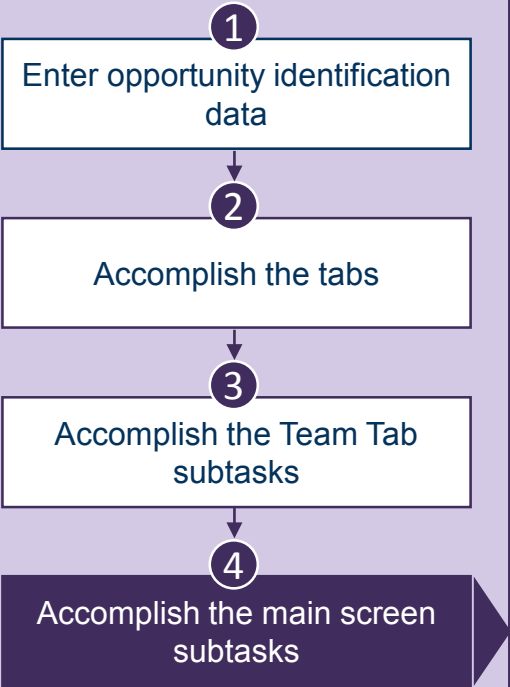
Lessons Learned

User-Defined InfoContractsSubcontractsOrganizational Conflict of Interest (OCI) RecordsProjects LinkedActivitiesDocumentsProject InitializationGovWin IQ

U

Click this link to open the GovWin IQ subtask.

# Manage Opportunities Overview



[Manage Opportunities](#) > [GovWin IQ](#) Deltek Costpoint

---

**Identification**

Opportunity ID:  Record Type:  [Refresh from IQ](#)

Name:  ☐ Do Not Refresh

---

**General**

Last GovWin IQ Synch:  GovWin IQ Analyst Update:

Program Name:  GovWin IQ ID:

Acronym:  Department:

Agency:

Current Status:

---

**Details**

Solicitation Number:  IQ Opportunity Link:

Estimated Value:  Duration:

Competition Type:  IQ Contract Type:

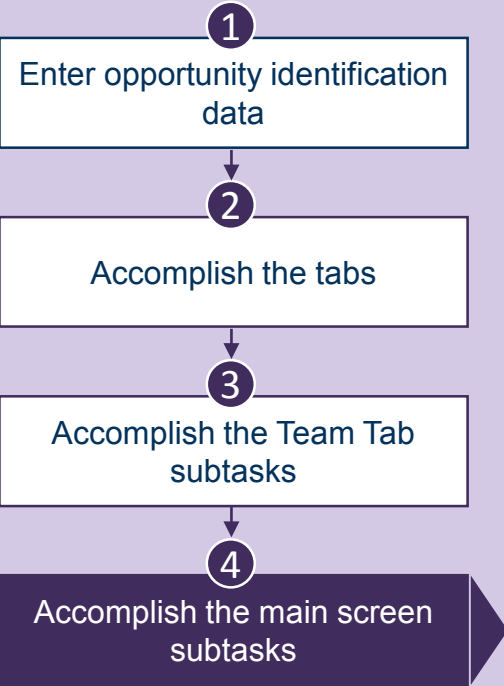
NAICS Code:  Primary Offering:

Comments:

Summary:

Potential Bidders:

# Manage Opportunities Overview



Current Status

Awarded

Details

Solicitation Number

VA11811RP0168

Estimated Value

100,000.00

Competition Type

Full and Open / Unrestricted

NAICS Code

541512 Computer Systems Design Services \$27.5 million annual rece

Comments

Due to the nature of BAA Procurements, the Contracting Office is not obligated to release Award information publicly. FOIA requests may be submitted for further information regarding potential Awards. Carol Newcomb (mailto:carol.newcomb@va.gov) is the Point of Contact for this effort.

Summary

Several vendors are fulfilling the Department of Veterans Affairs (VA), Office of Information & Technology (OI&T) requirement for innovative ideas in specific areas of interest including the expansion of the capabilities of Blue Button technology; sterilization of reusable medical equipment; teleaudiology; and advancing prosthetic socket design to be addressed through the 2011 VA Innovation Initiative (VAi2) Broad Agency Announcement (BAA).

Potential Bidders

Procurement Activity

Due to the nature of BAA Procurements, the Contracting Office is not obligated to release Award information publicly. FOIA requests may be submitted for further information regarding potential Awards. Carol Newcomb (mailto:carol.newcomb@va.gov) is the Point of Contact for this effort.

Program Description

SUMMARY:  
Several vendors are fulfilling the Department of Veterans Affairs (VA), Office of Information & Technology (OI&T) requirement for innovative ideas in specific areas of interest including the expansion of the capabilities of Blue Button technology; sterilization of reusable medical equipment; teleaudiology; and

IQ Opportunity Link

http://www.fbo.gov

Duration

24 month(s) base

IQ Contract Type

Firm Fixed Price

Primary Offering

Research & Development

W

Scroll down to the bottom of the screen to access the subtasks under the GovWin IQ subtask.

On these subtasks, you can view the opportunity's milestone dates and contact information as transferred from GovWin IQ. You can also view information on employees who marked the opportunity in GovWin IQ for import into Costpoint.

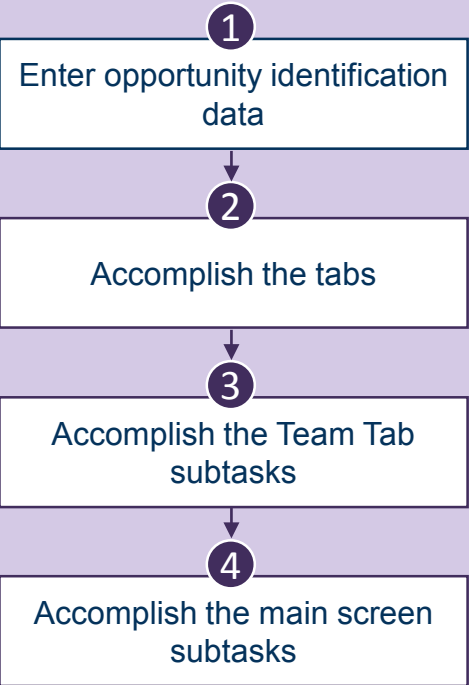
GovWin IQ Key Dates

GovWin IQ Key Contacts

GovWin IQ Added By

Close

# Manage Opportunities Overview



Current Status

Awarded

Details

Solicitation Number

VA11811RP0168

IQ Opportunity Link

<http://www.fbo.gov>

Estimated Value

100

Competition Type

Full and Open / Unre

NAICS Code

541512 Computer S

Comments

Due to the nature of further information re

may be submitted for port.

Summary

Several vendors are fulfilling the Department of Veterans Affairs (VA), Office of Information & Technology (OI&T) requirement for innovative ideas in specific areas of interest including the expansion of the capabilities of Blue Button technology; sterilization of reusable medical equipment; teleaudiology; and advancing prosthetic socket design to be addressed through the 2011 VA Innovation Initiative (VAi2) Broad Agency Announcement (BAA).

Potential Bidders

Procurement Activity

Due to the nature of BAA Procurements, the Contracting Office is not obligated to release Award information publicly. FOIA requests may be submitted for further information regarding potential Awards. Carol Newcomb (mailto:carol.newcomb@va.gov) is the Point of Contact for this effort.

Program Description

SUMMARY:  
Several vendors are fulfilling the Department of Veterans Affairs (VA), Office of Information & Technology (OI&T) requirement for innovative ideas in specific areas of interest including the expansion of the capabilities of Blue Button technology; sterilization of reusable medical equipment; teleaudiology; and

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