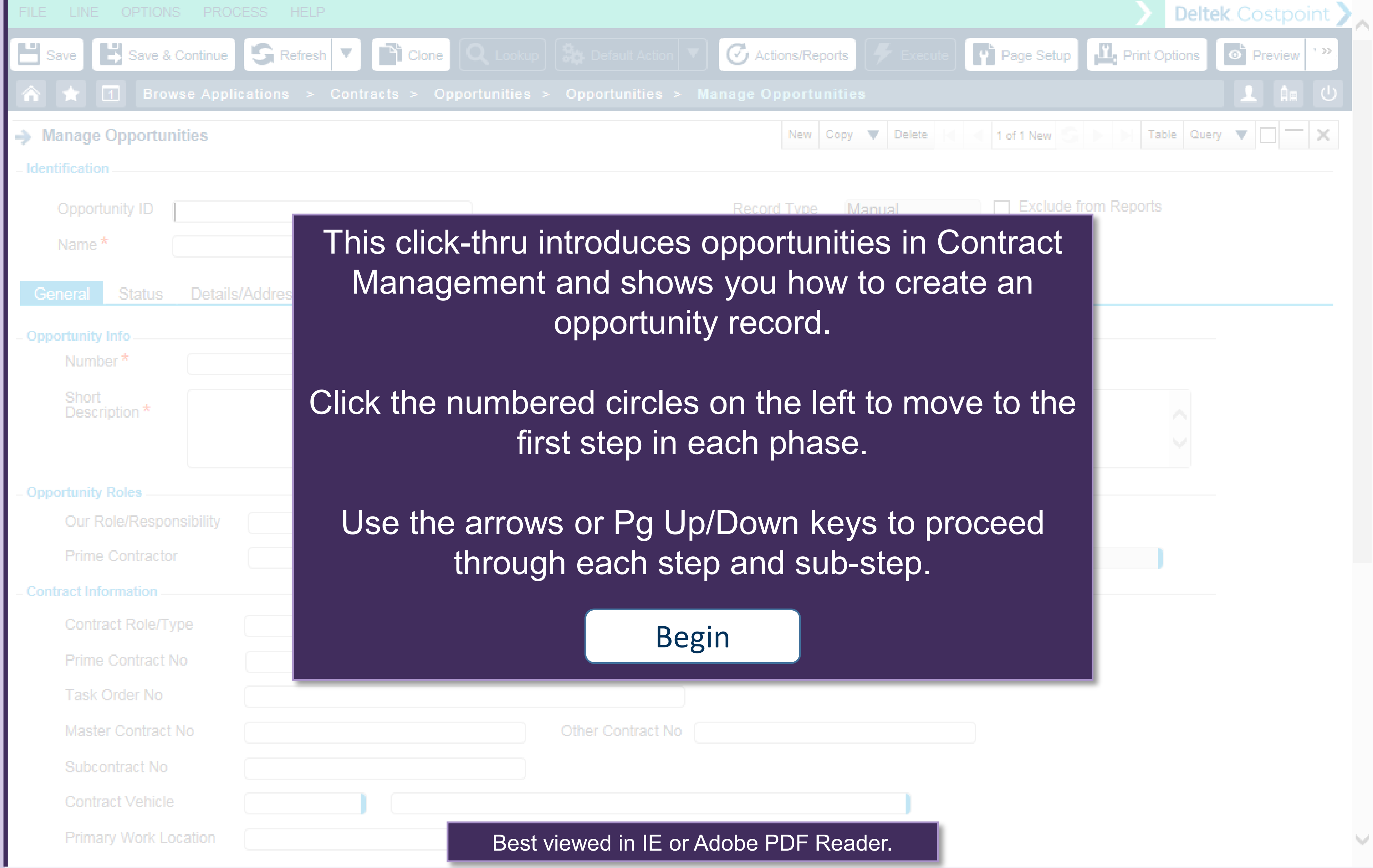
Manage Opportunities Overview

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



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.

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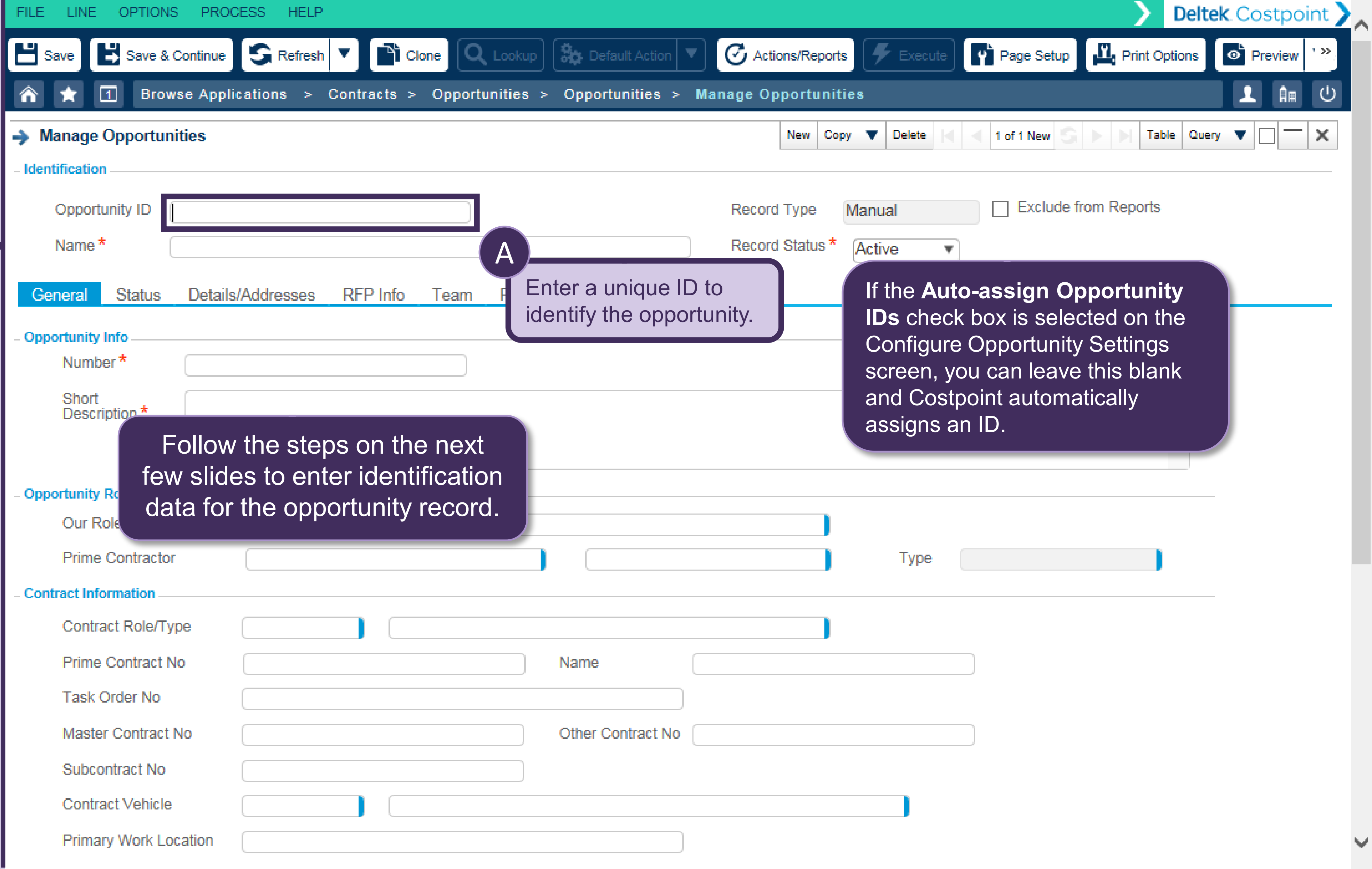

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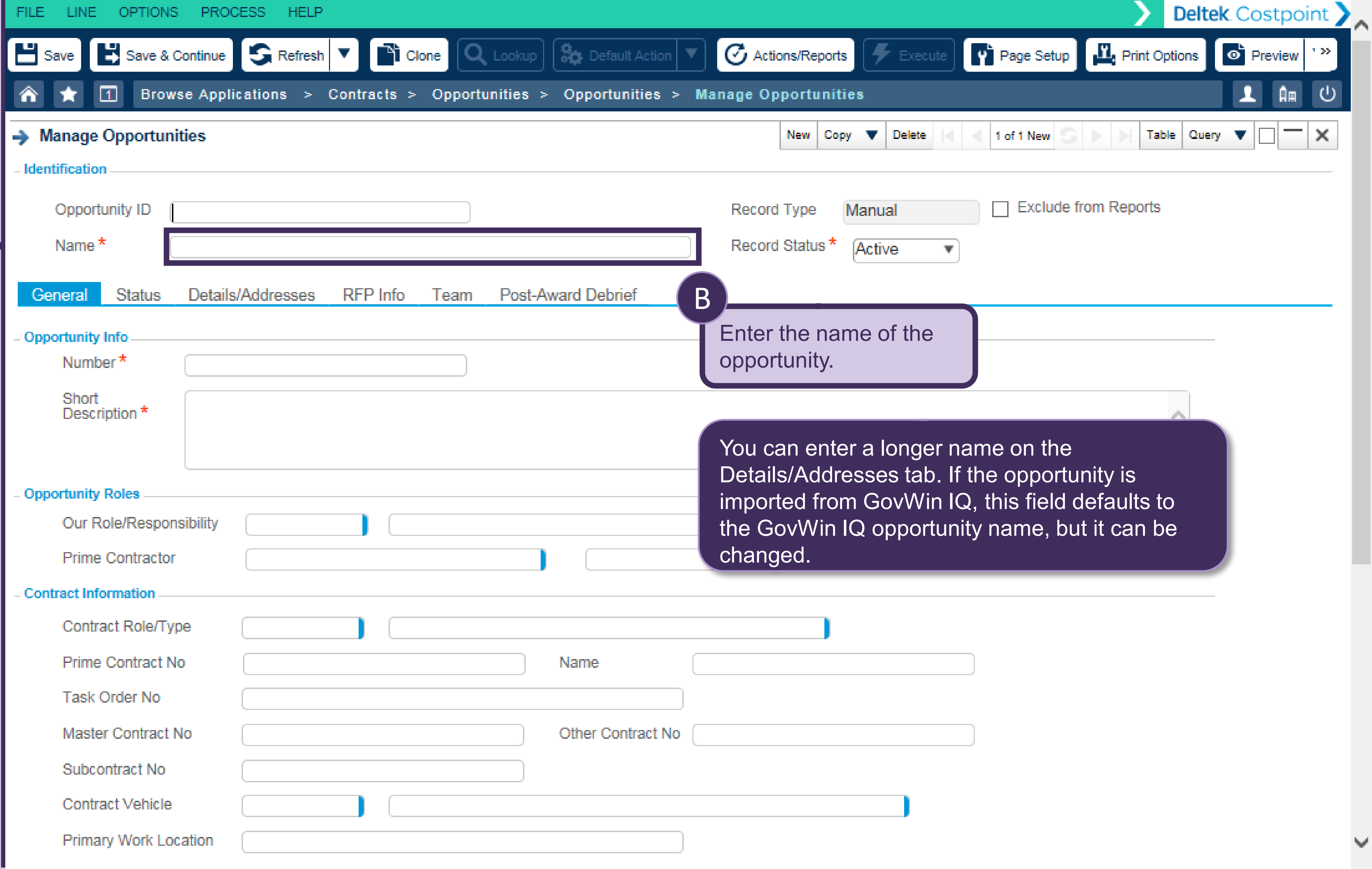

B

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.

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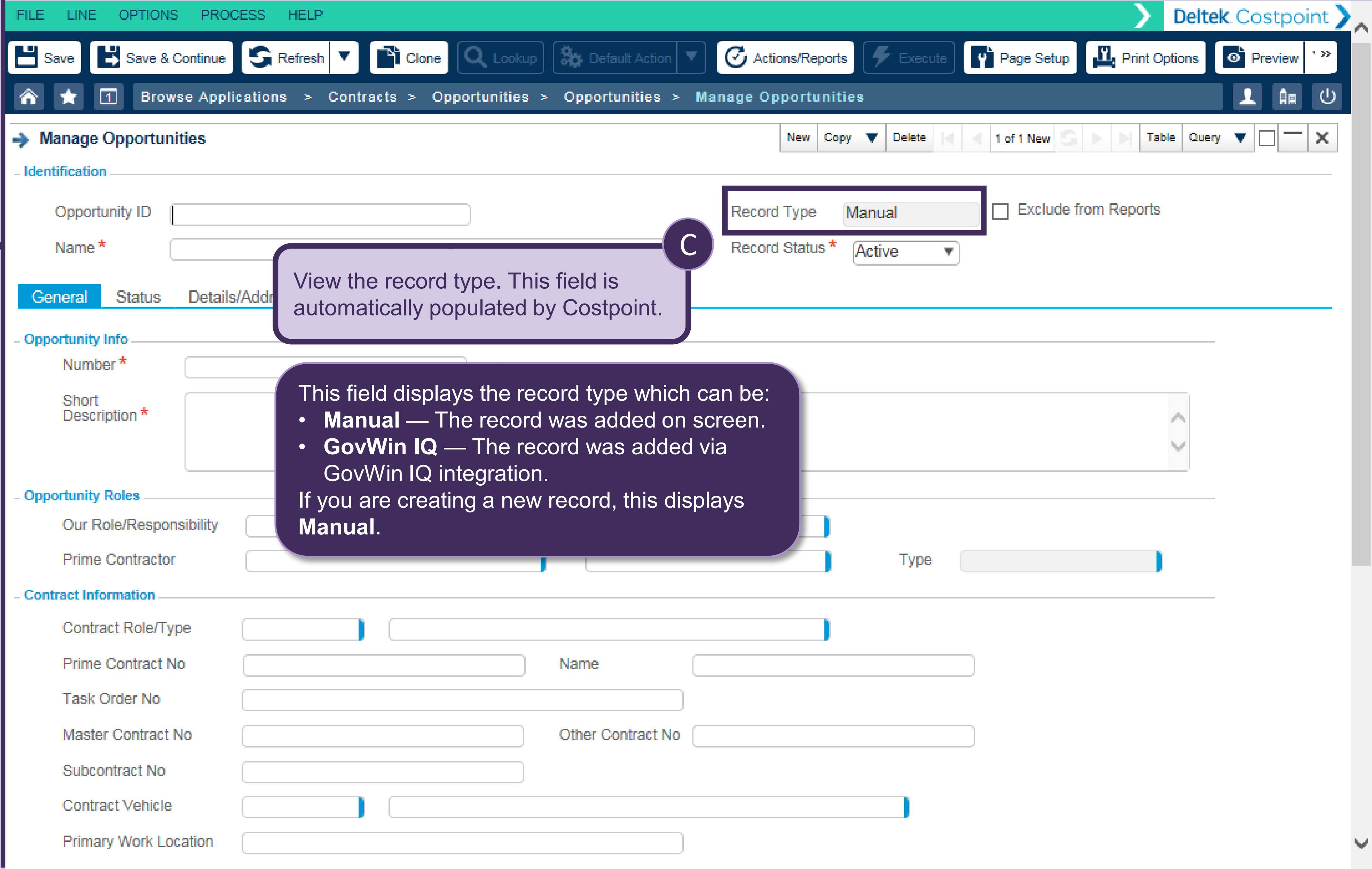

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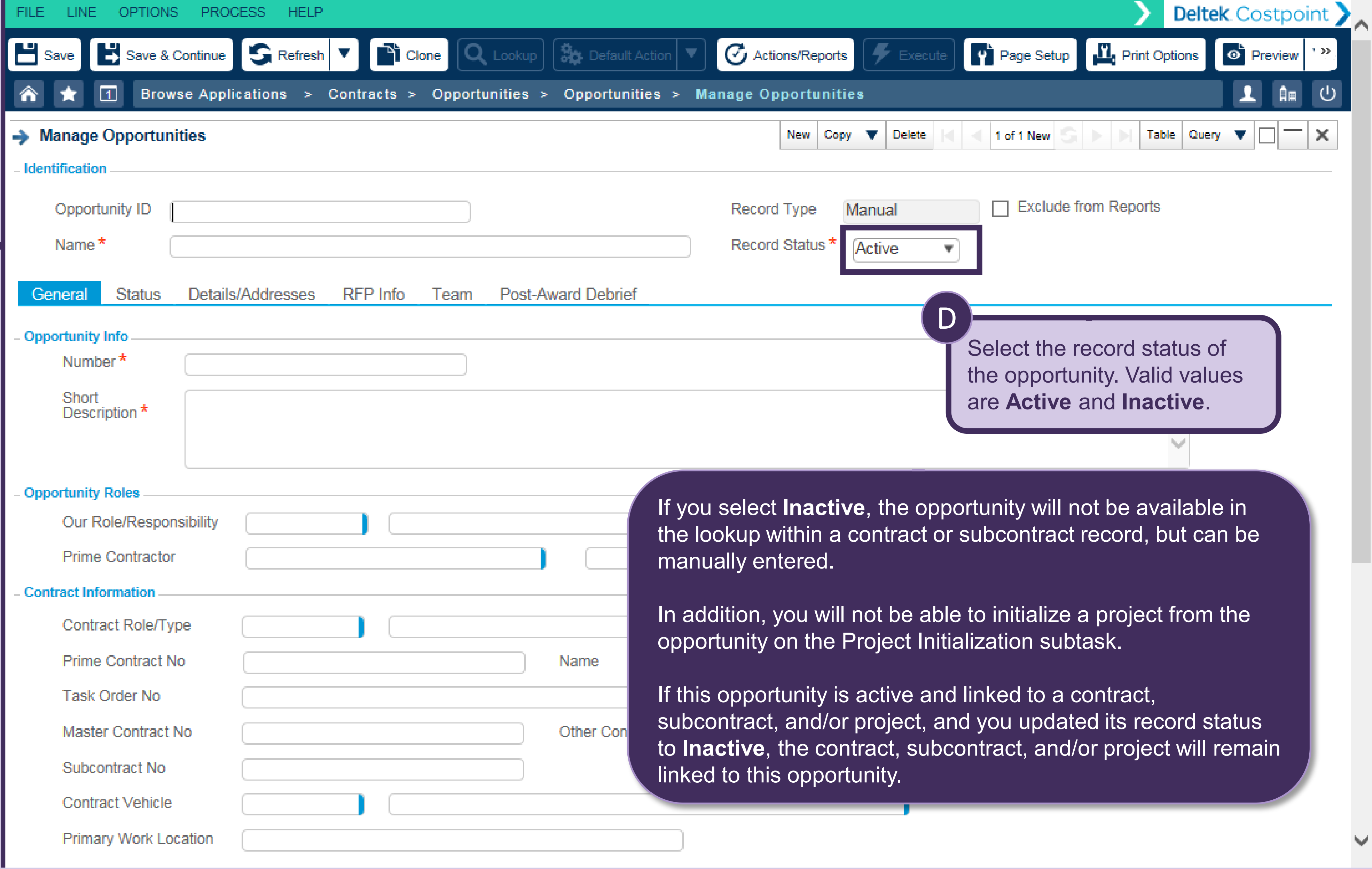

D

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.

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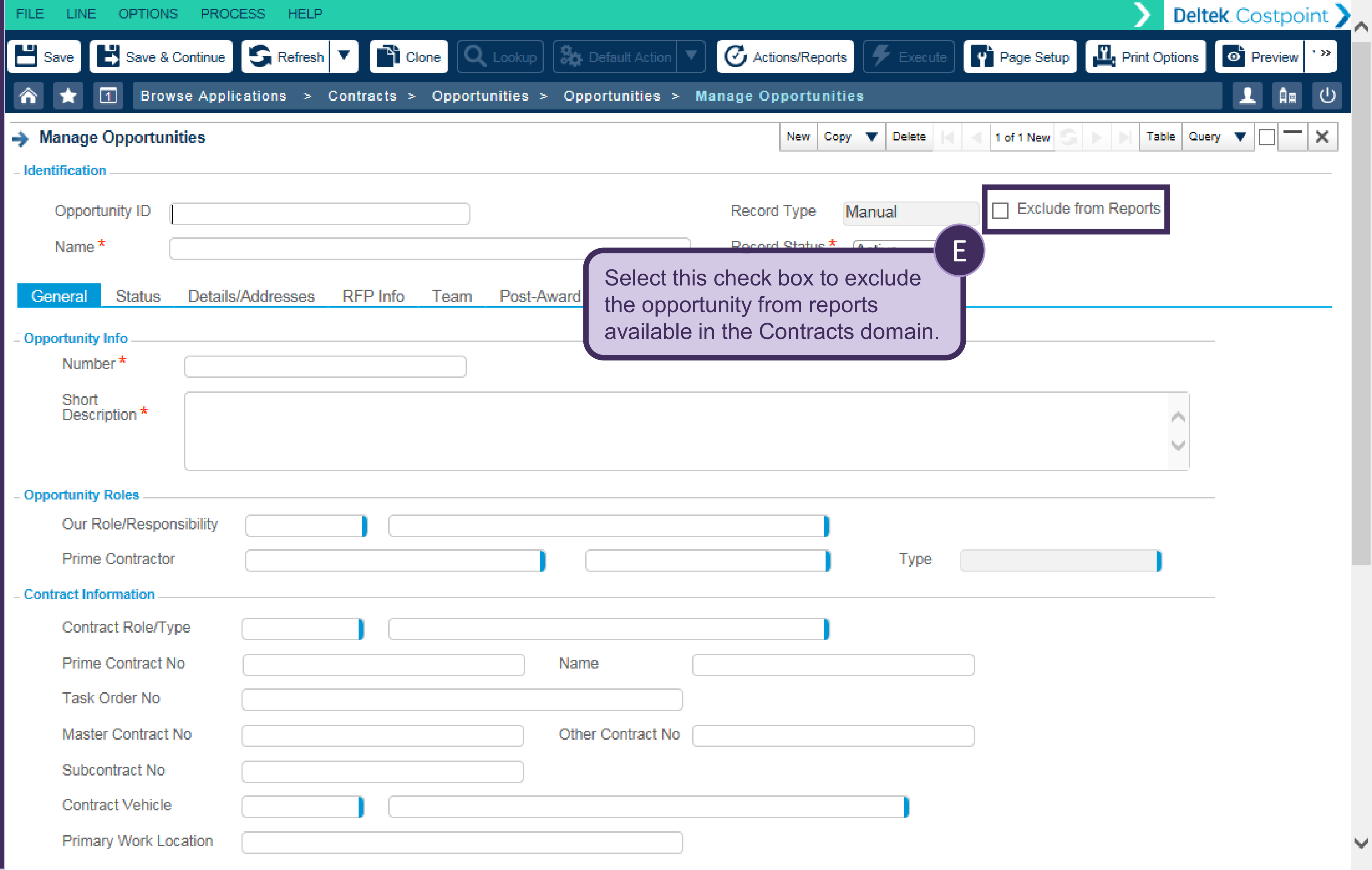

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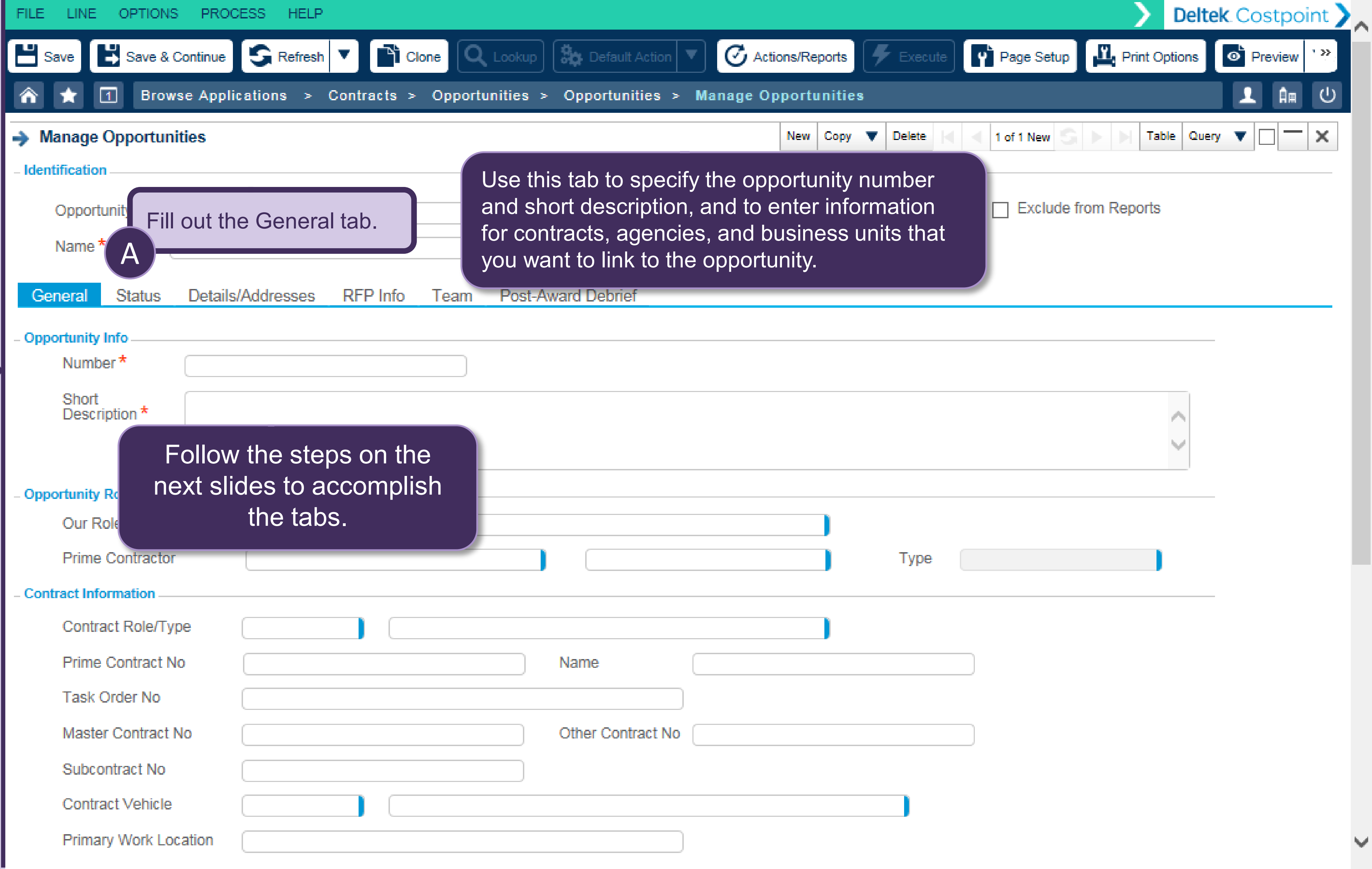

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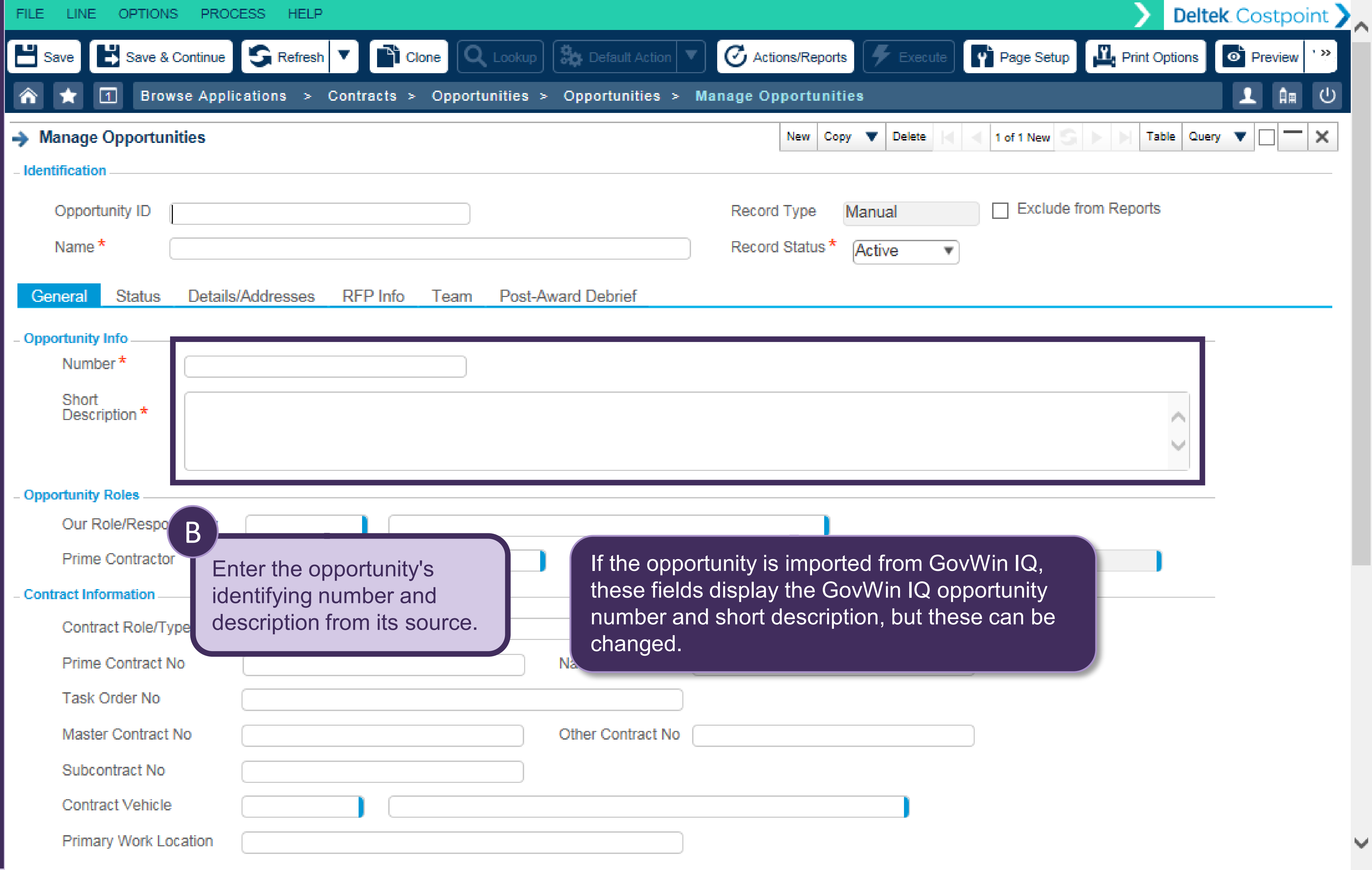

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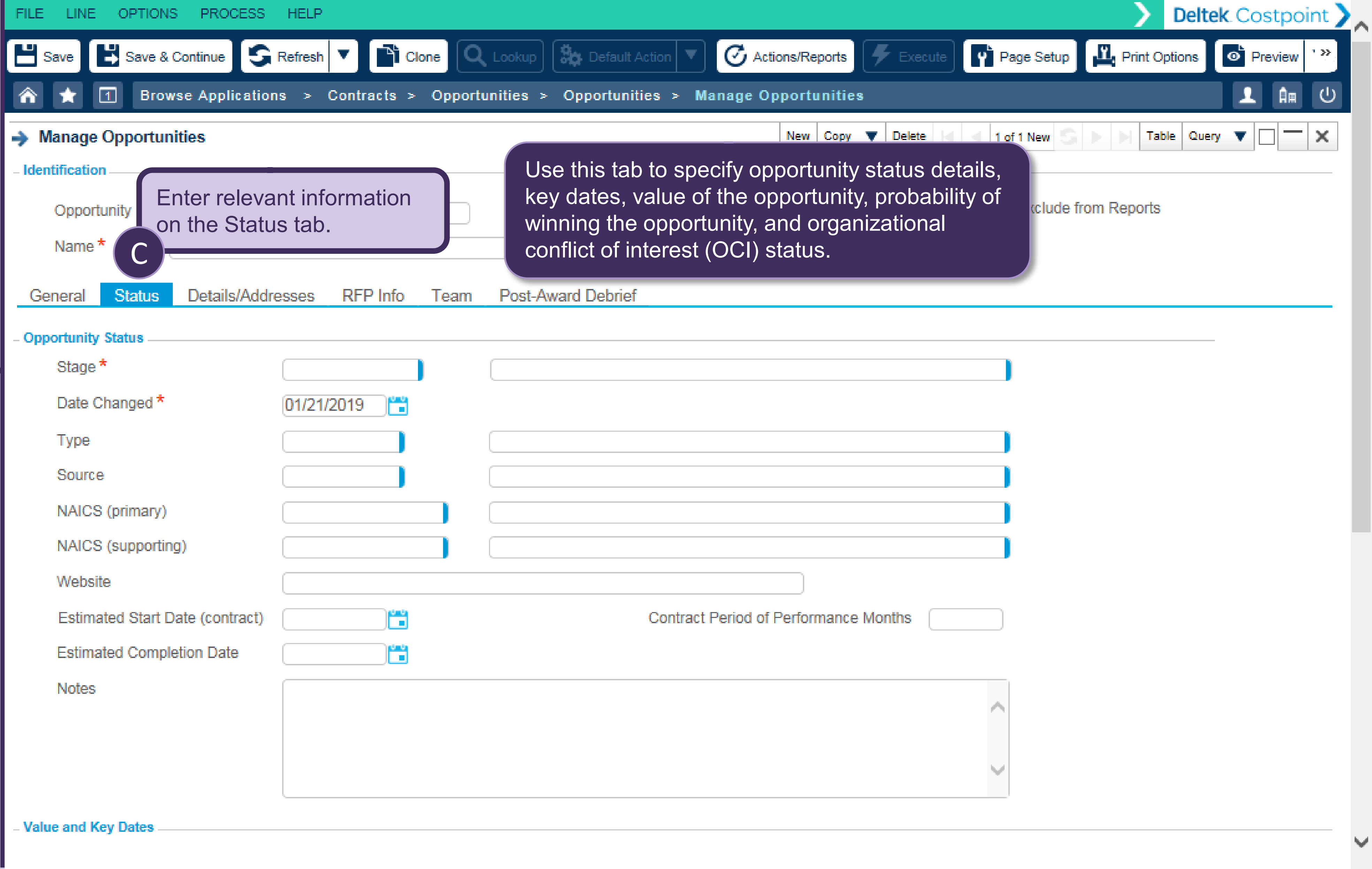

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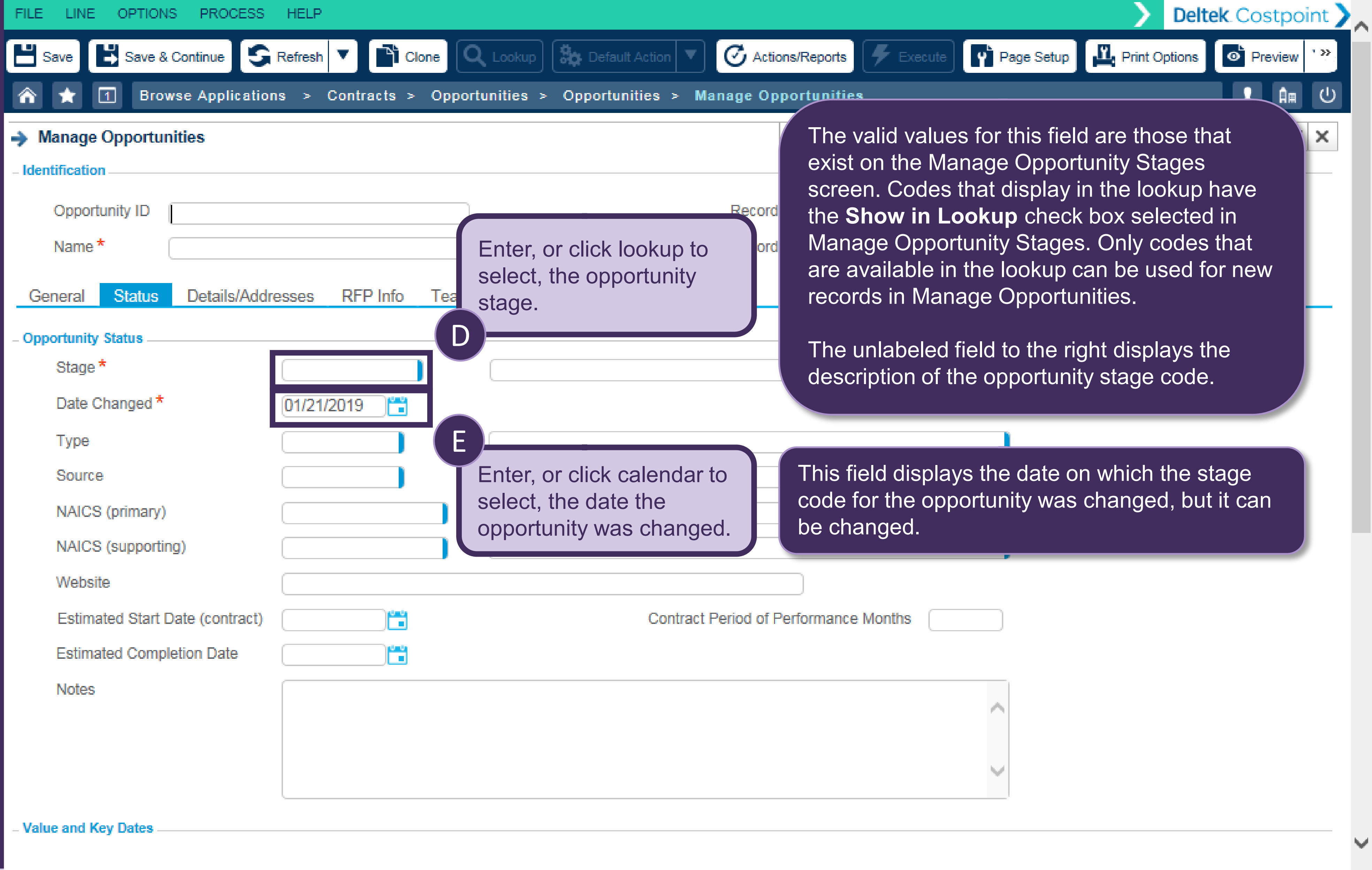

D

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

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.

E

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

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

Manage Opportunities Overview

1
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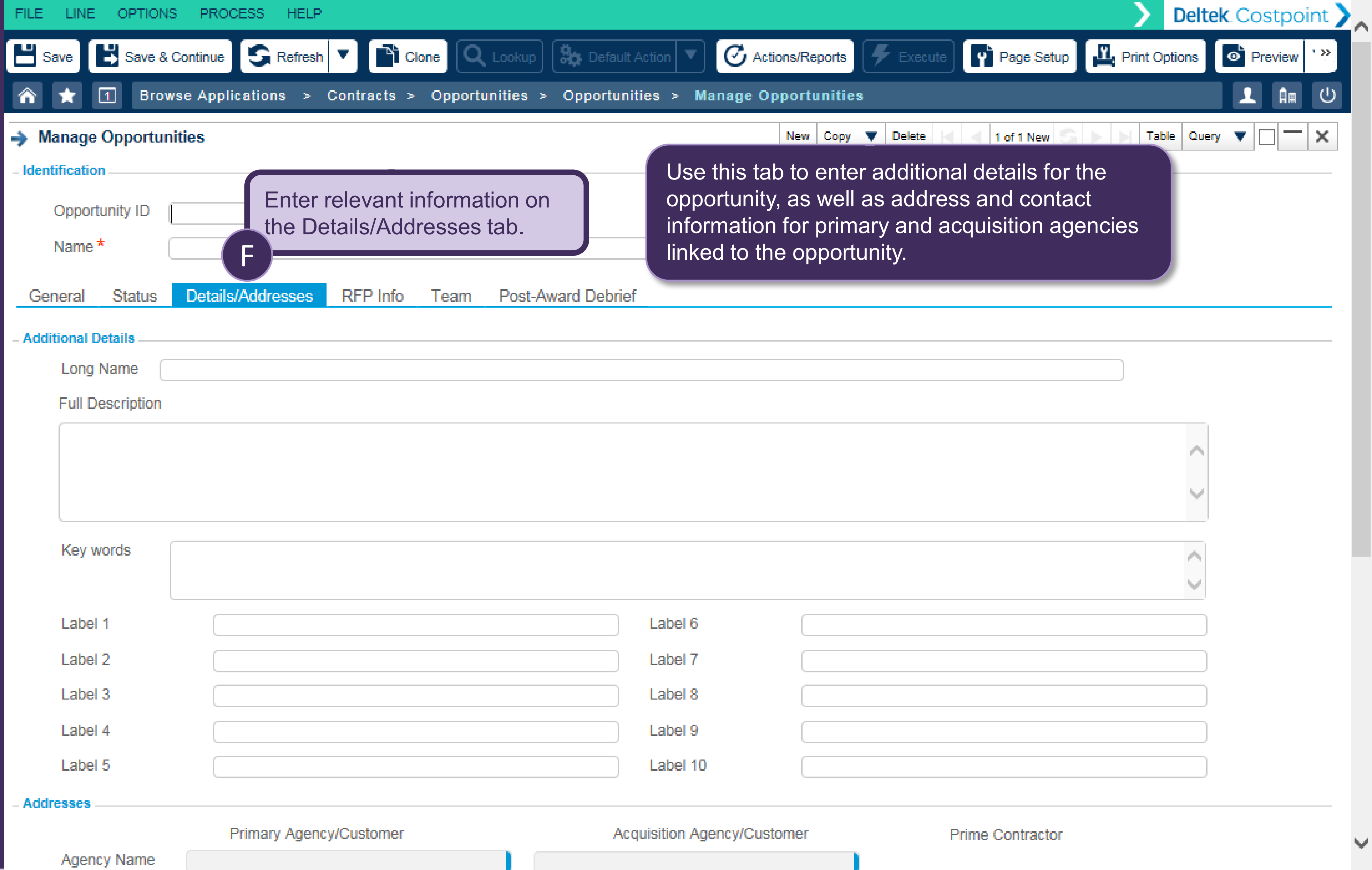

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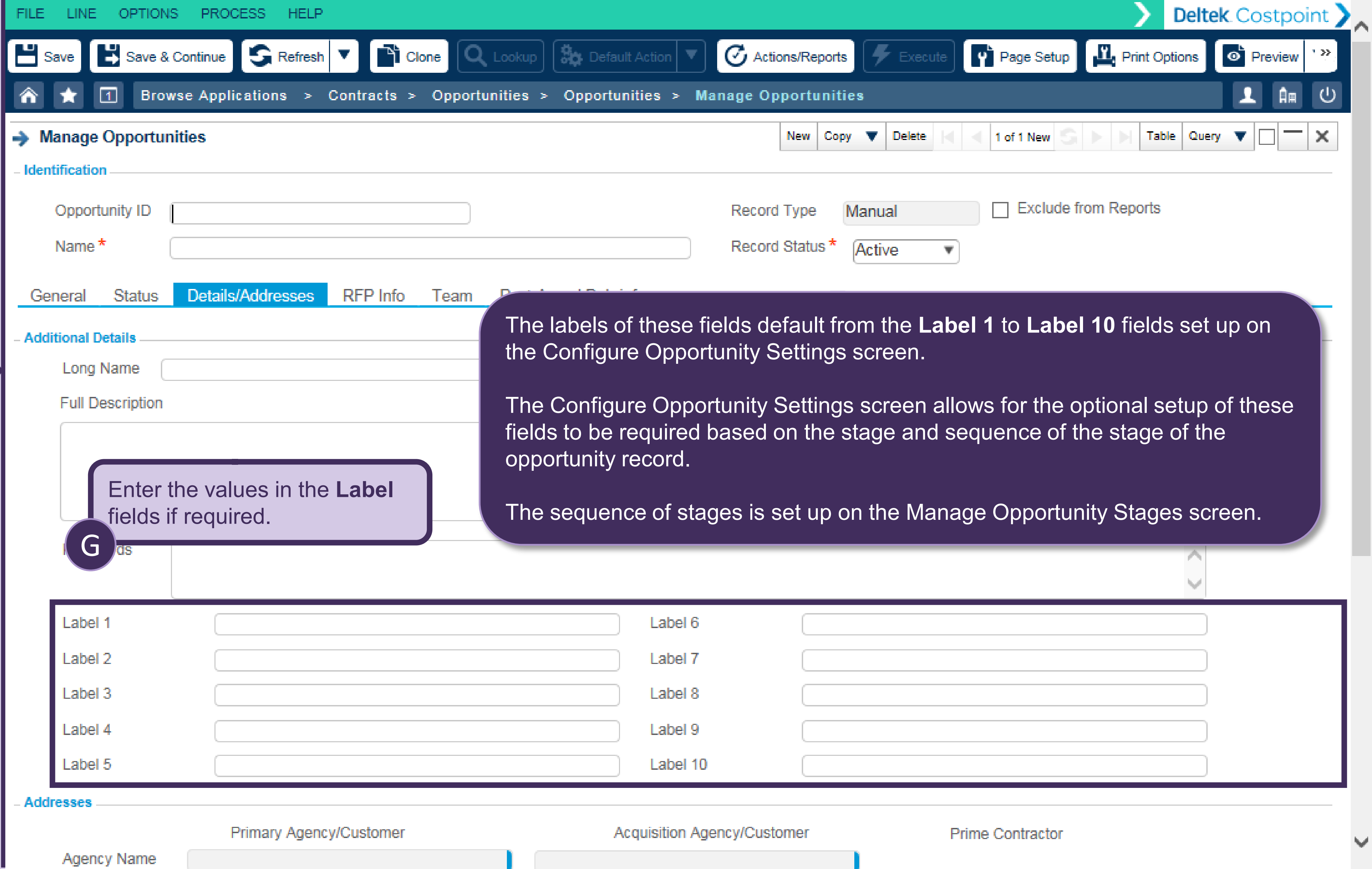

G Enter the values in the **Label** fields if required.

The labels of these fields default from the **Label 1** to **Label 10** fields set up on the Configure Opportunity Settings screen.

The Configure Opportunity Settings screen allows for the 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.

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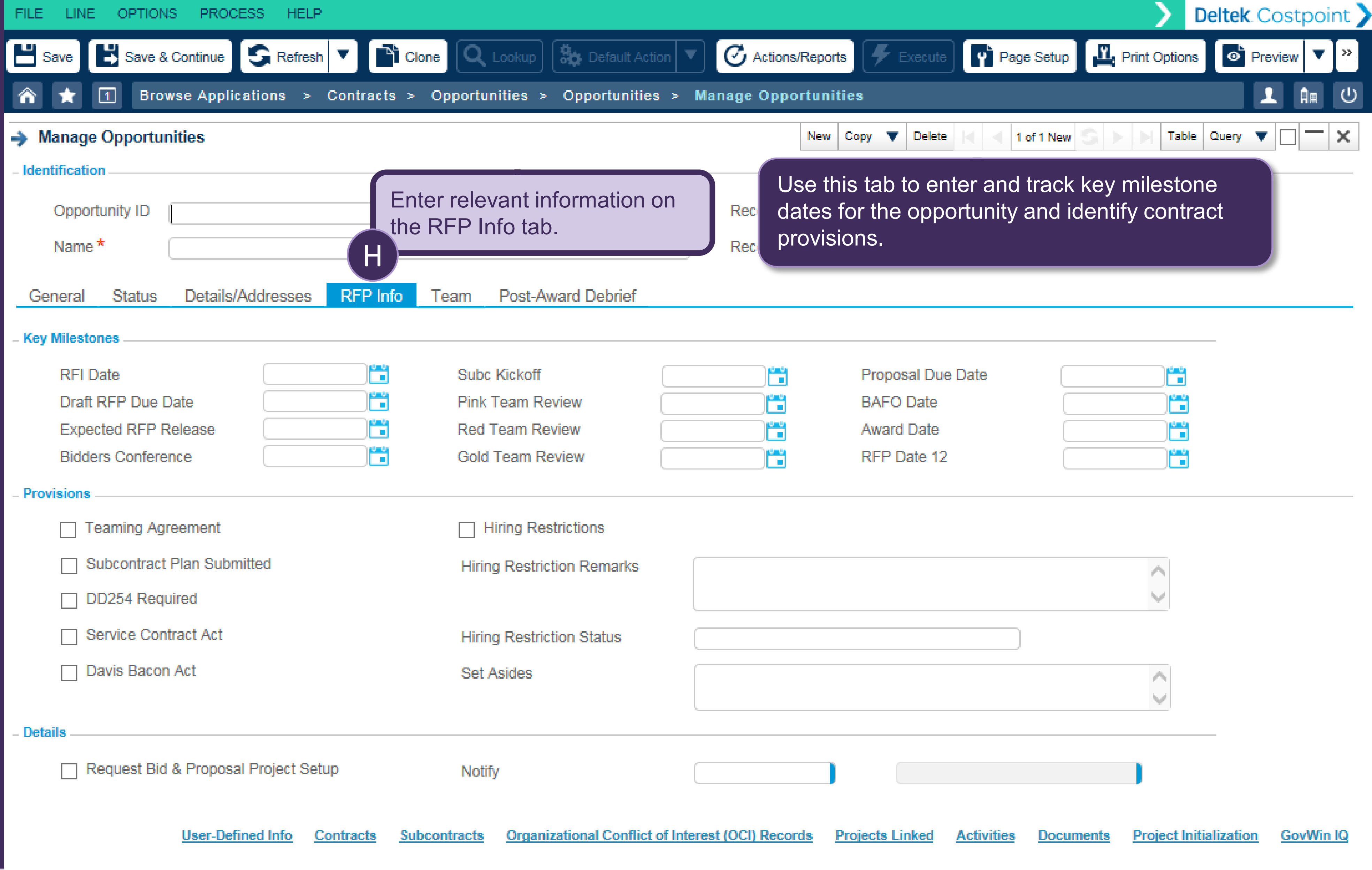

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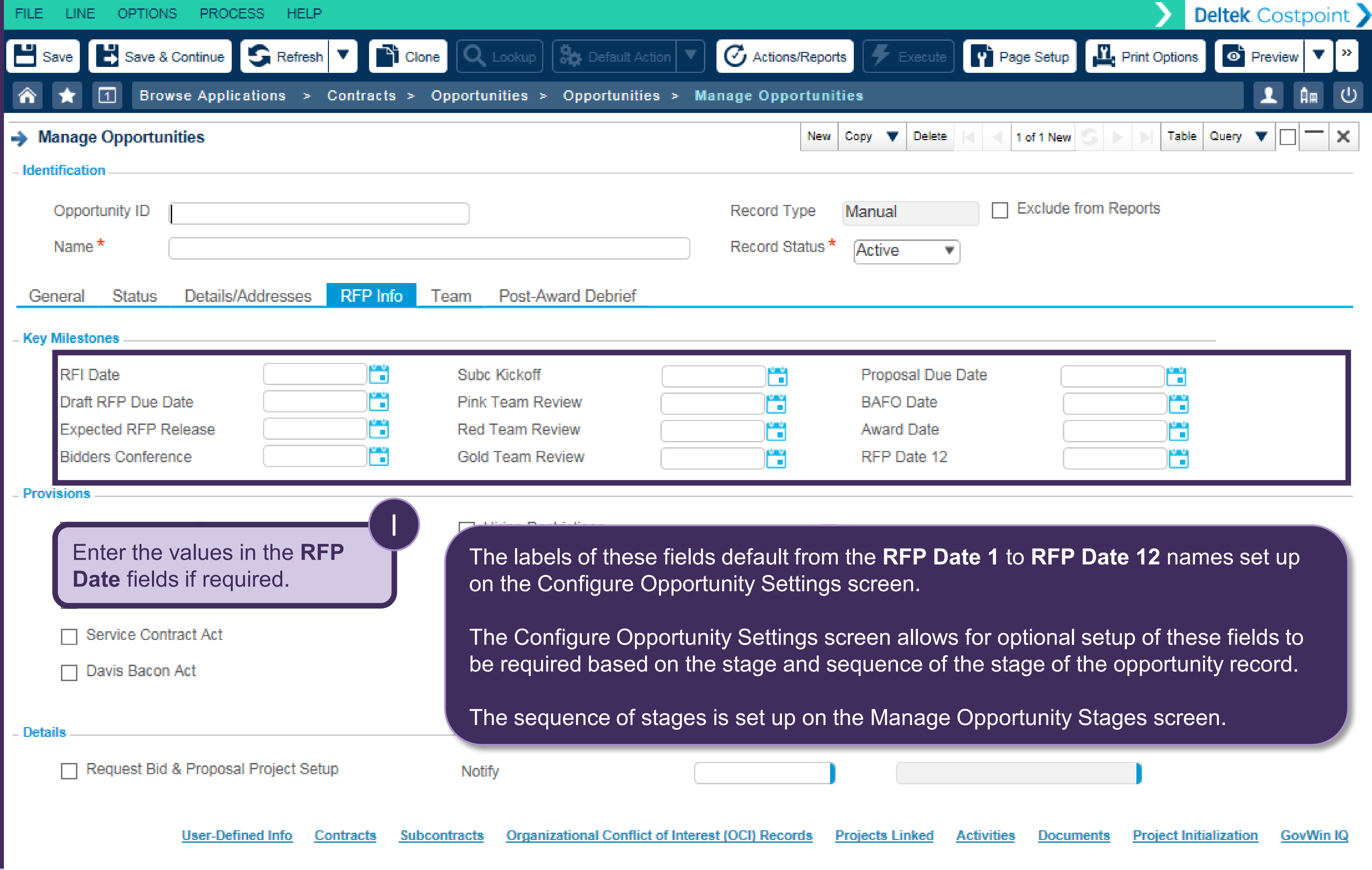

I

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.

Manage Opportunities Overview

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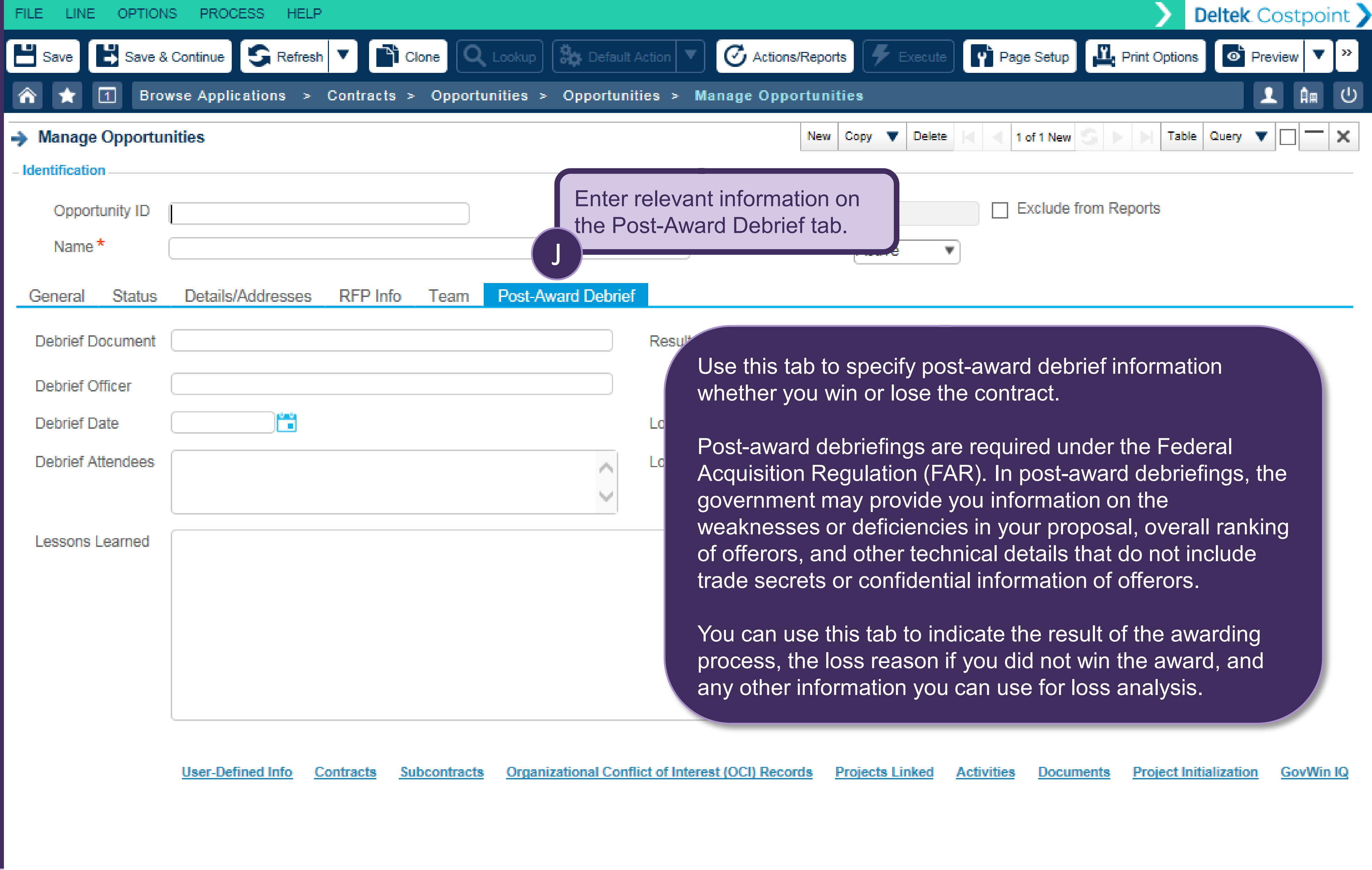

J

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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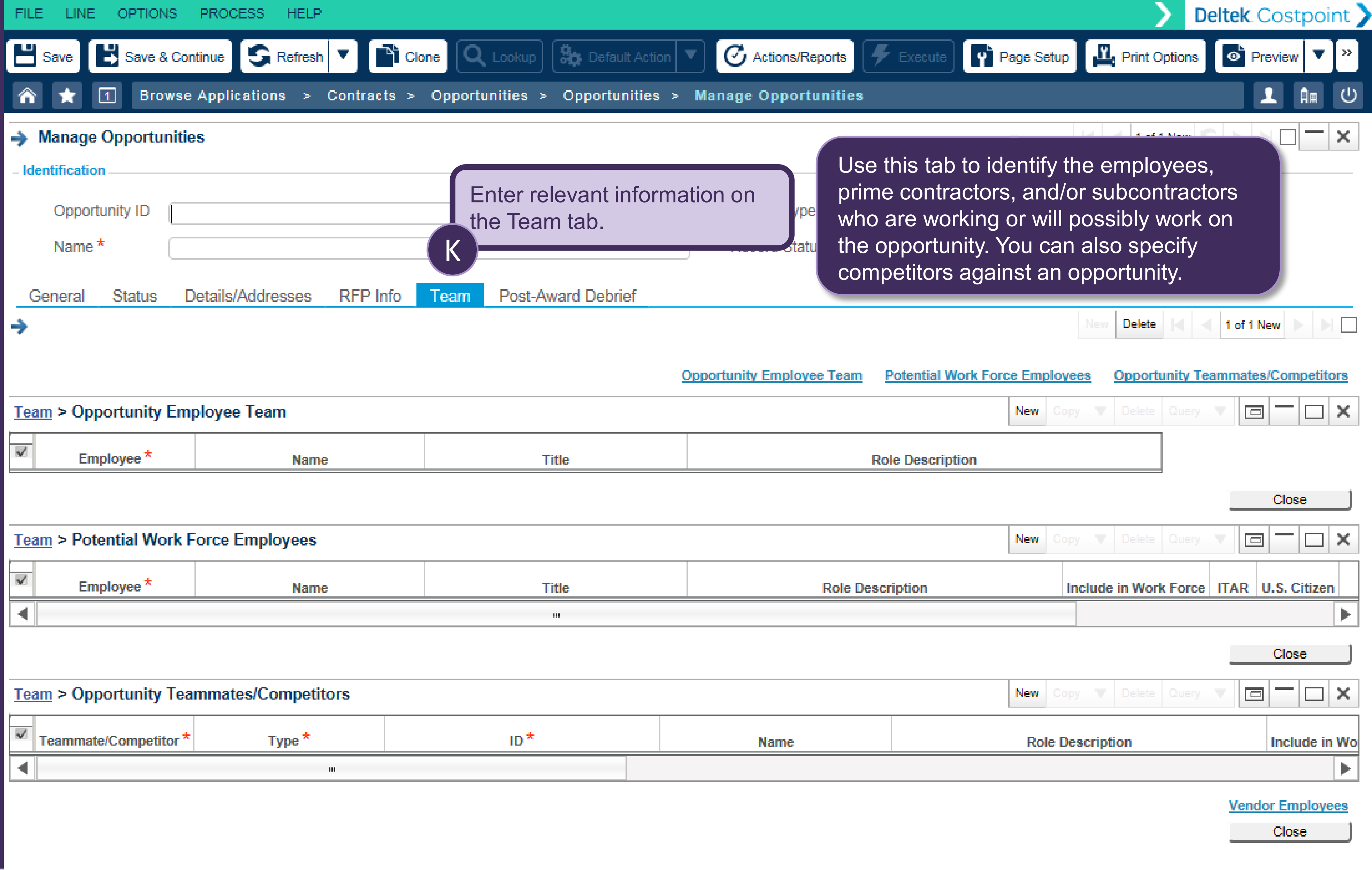

K

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.

Manage Opportunities Overview

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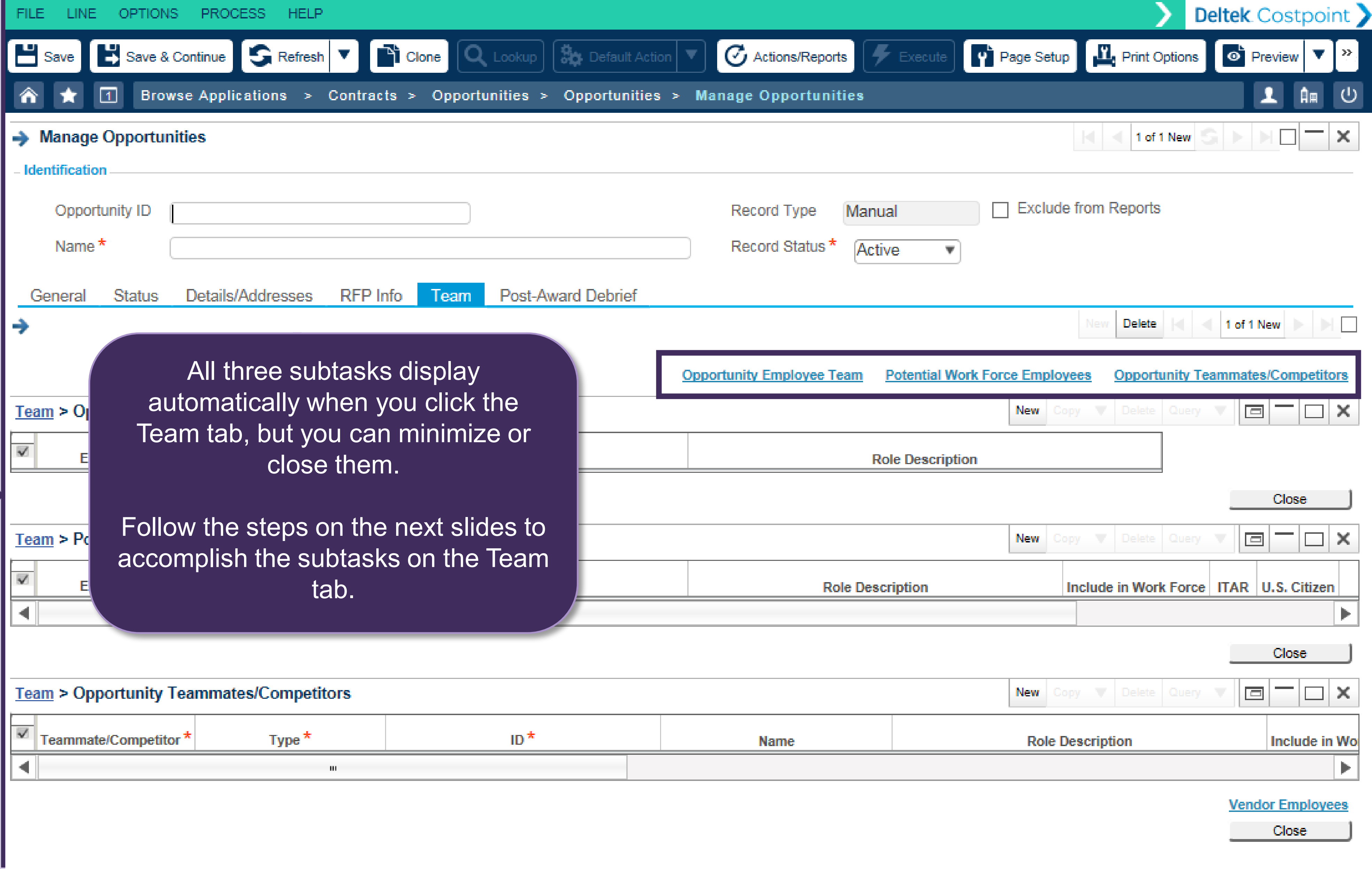

All three subtasks display automatically when you click the Team tab, but you can minimize or close them.

Follow the steps on the next slides to accomplish the subtasks on the Team tab.

Manage Opportunities Overview

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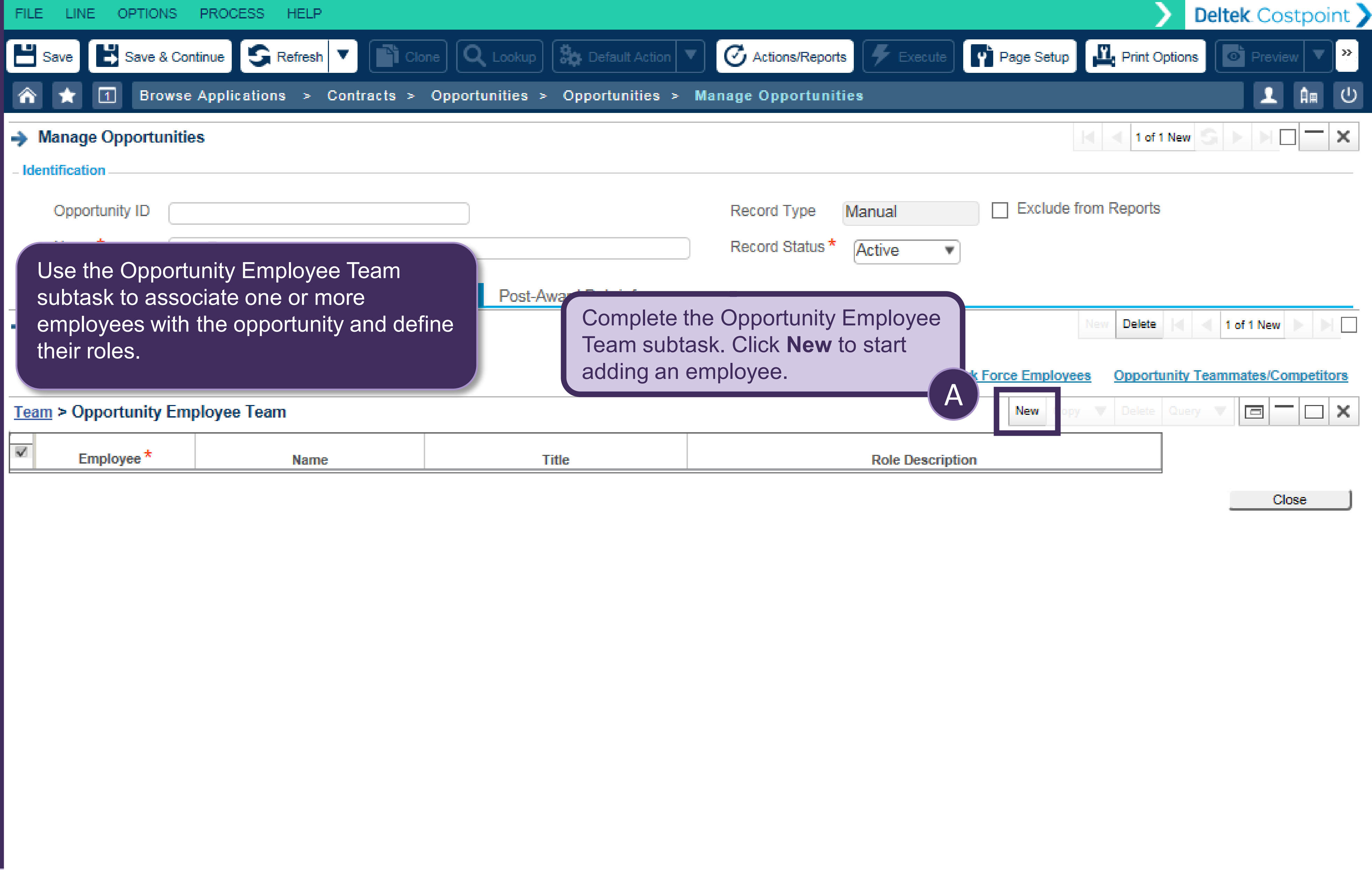

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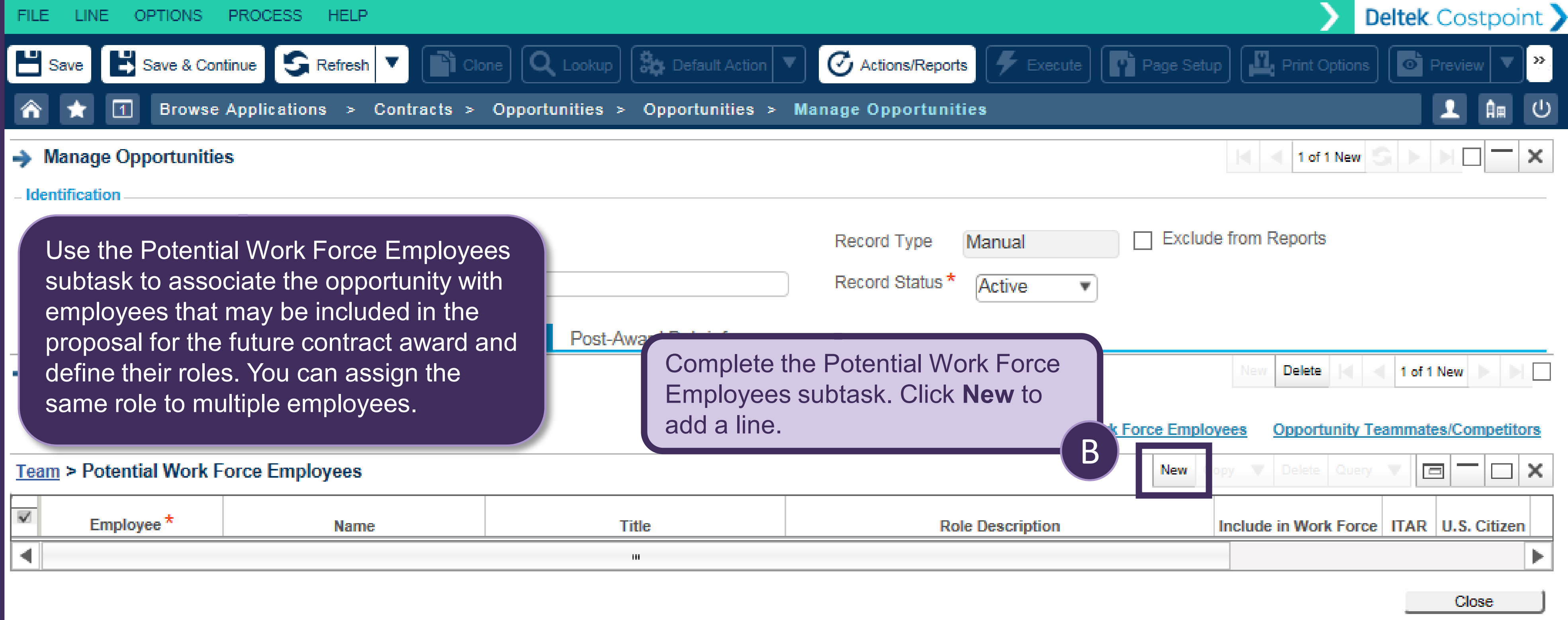

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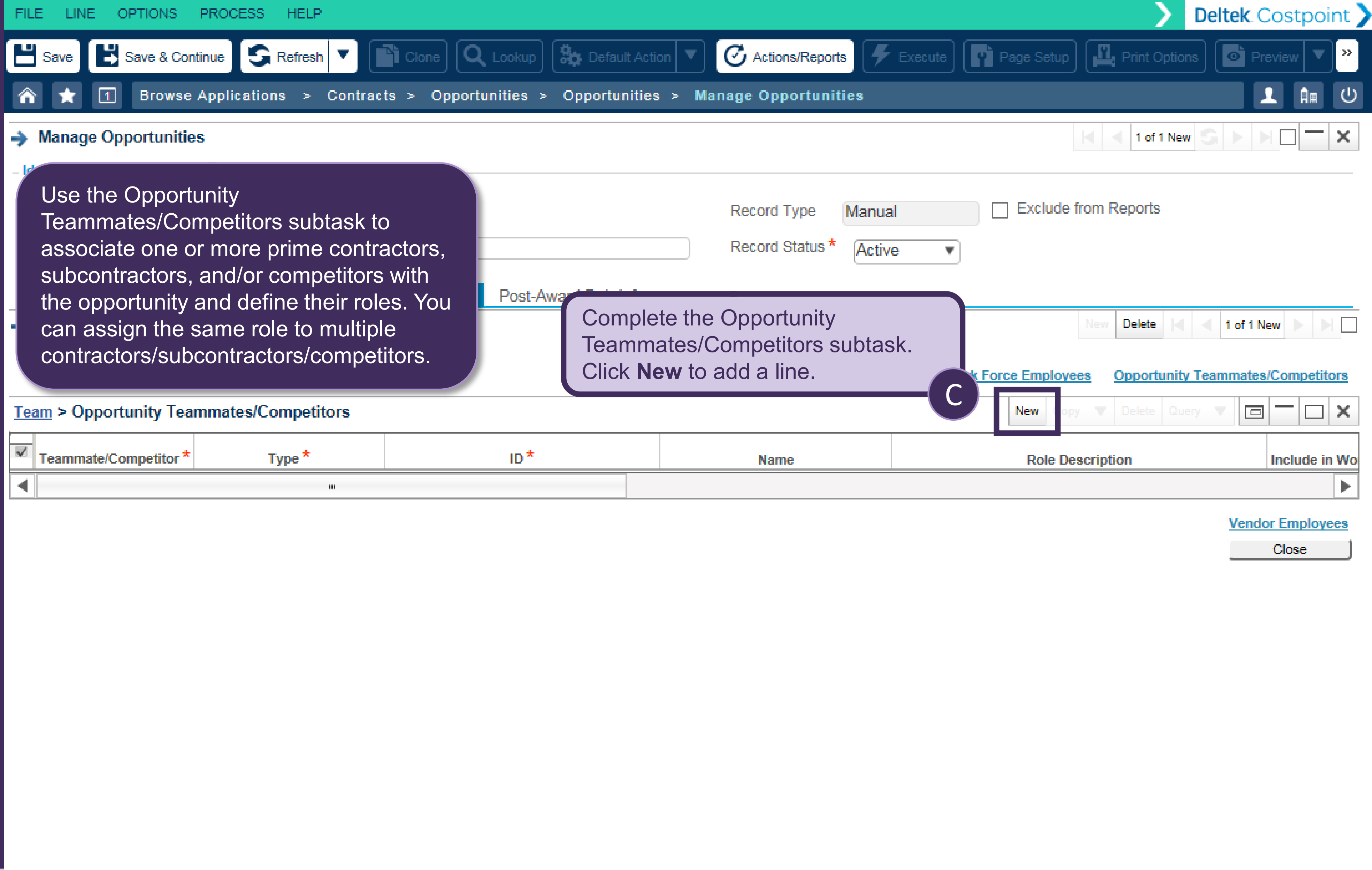

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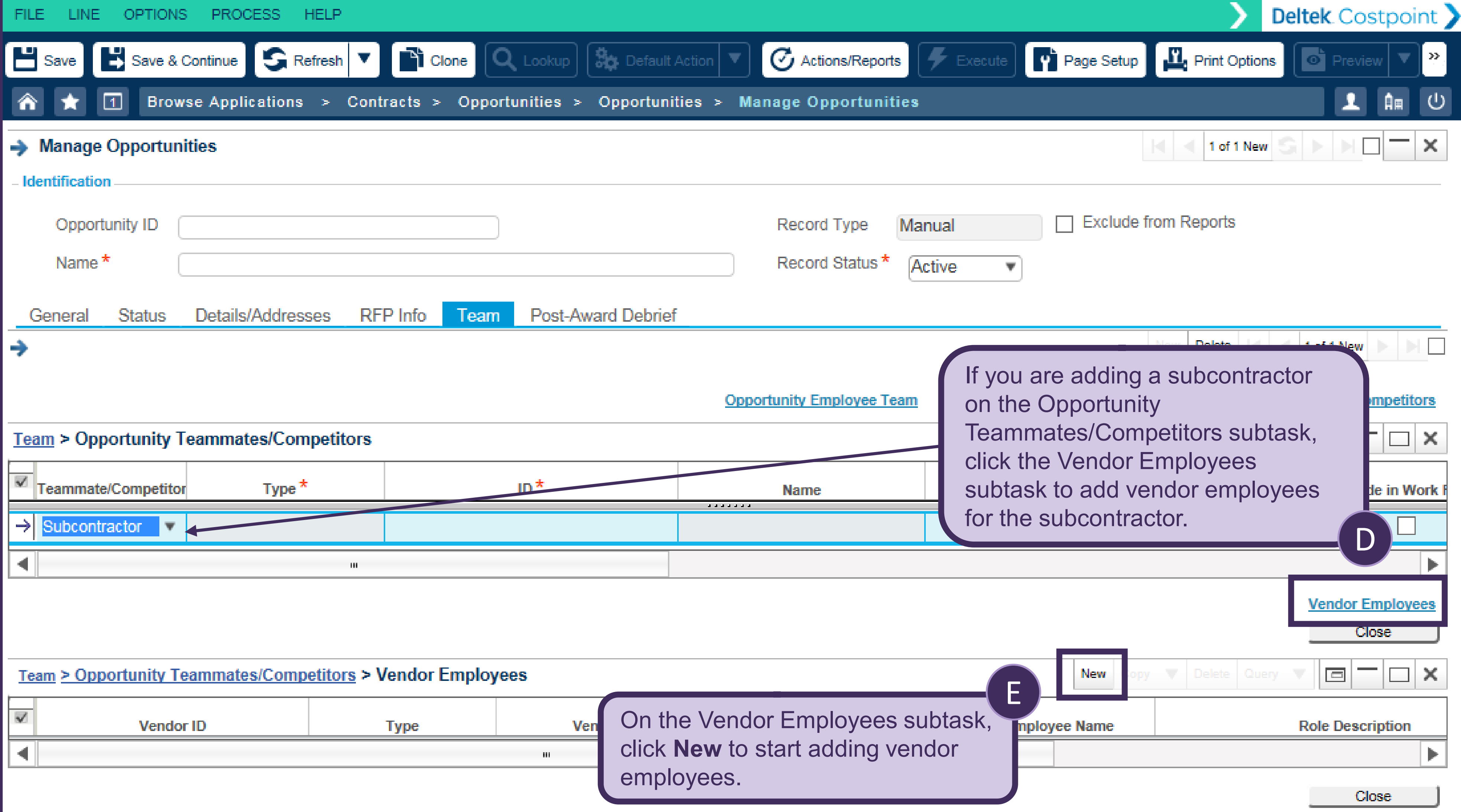

D If you are adding a subcontractor on the Opportunity Teammates/Competitors subtask, click the Vendor Employees subtask to add vendor employees for the subcontractor.

E 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.

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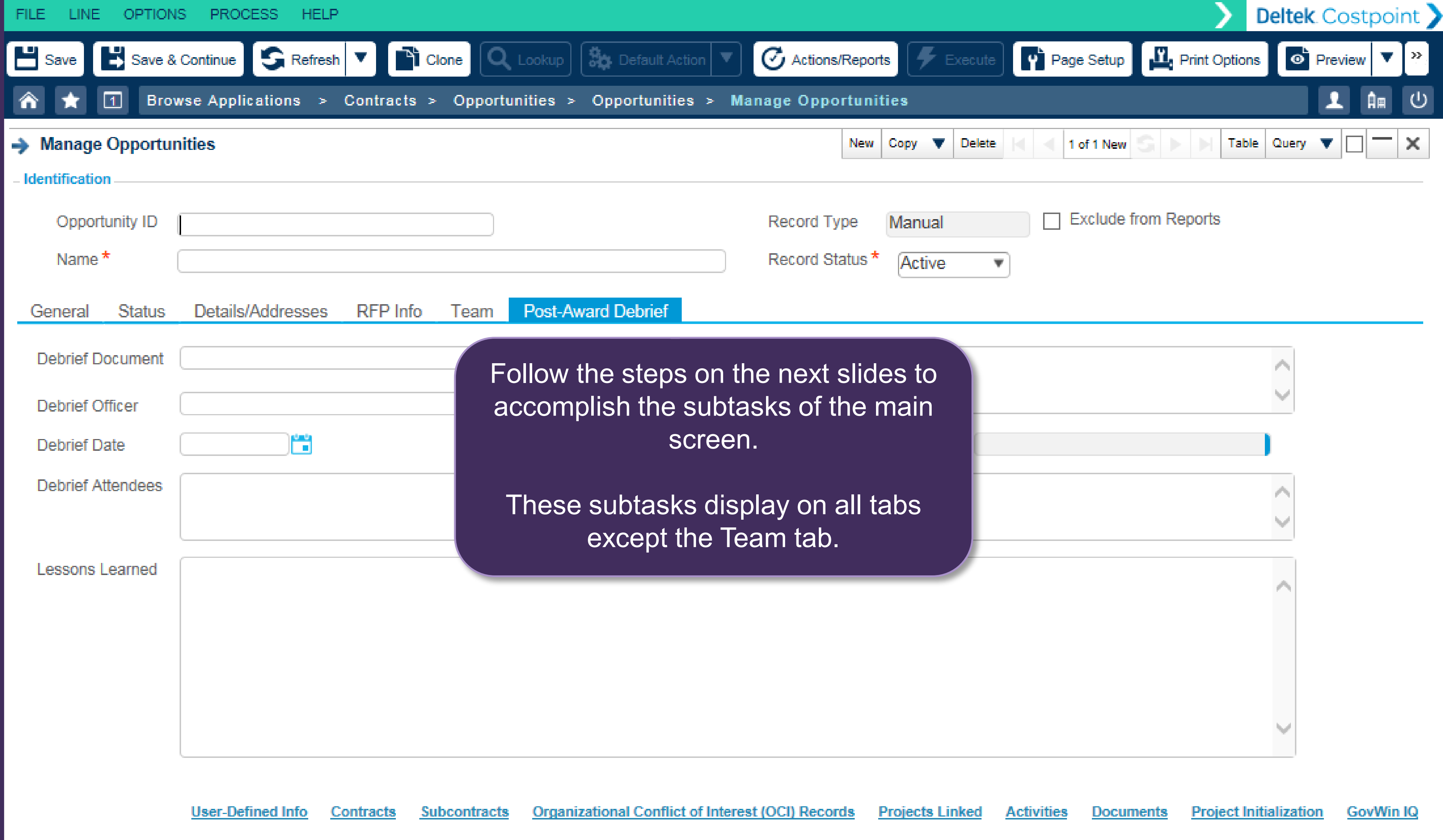

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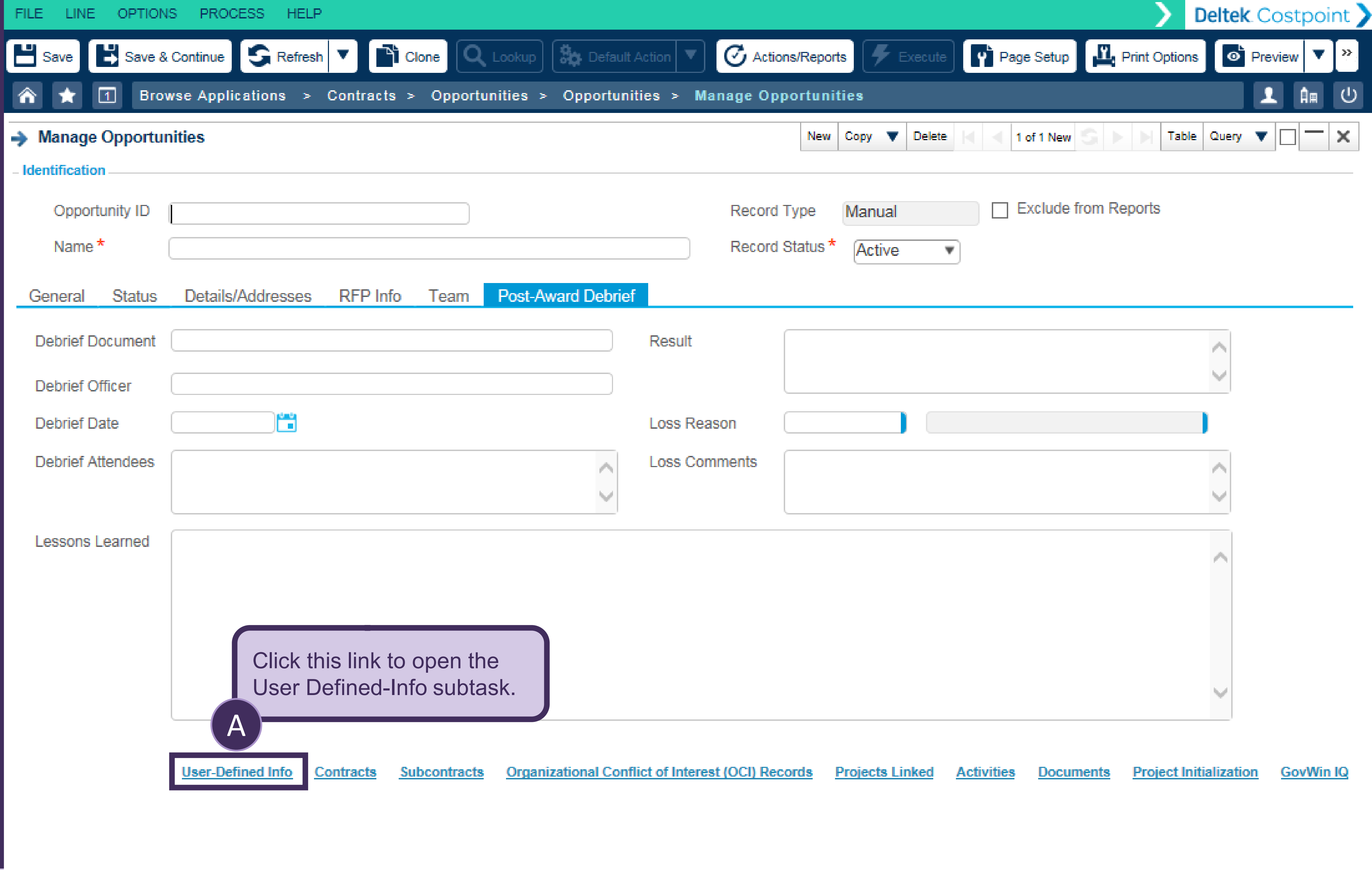

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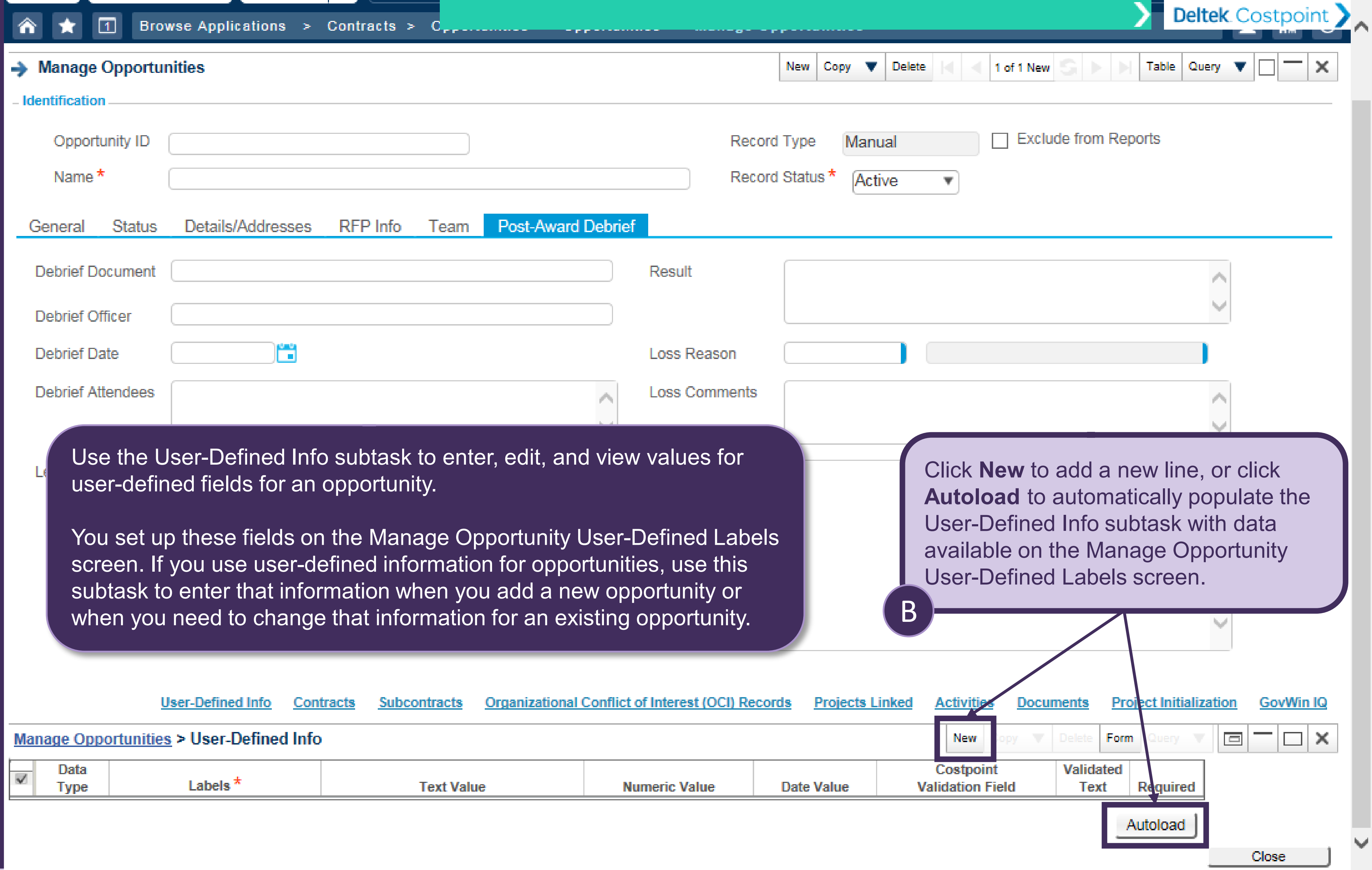

Use the User-Defined Info subtask to enter, edit, and view values for user-defined fields for an opportunity.

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.

B

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.

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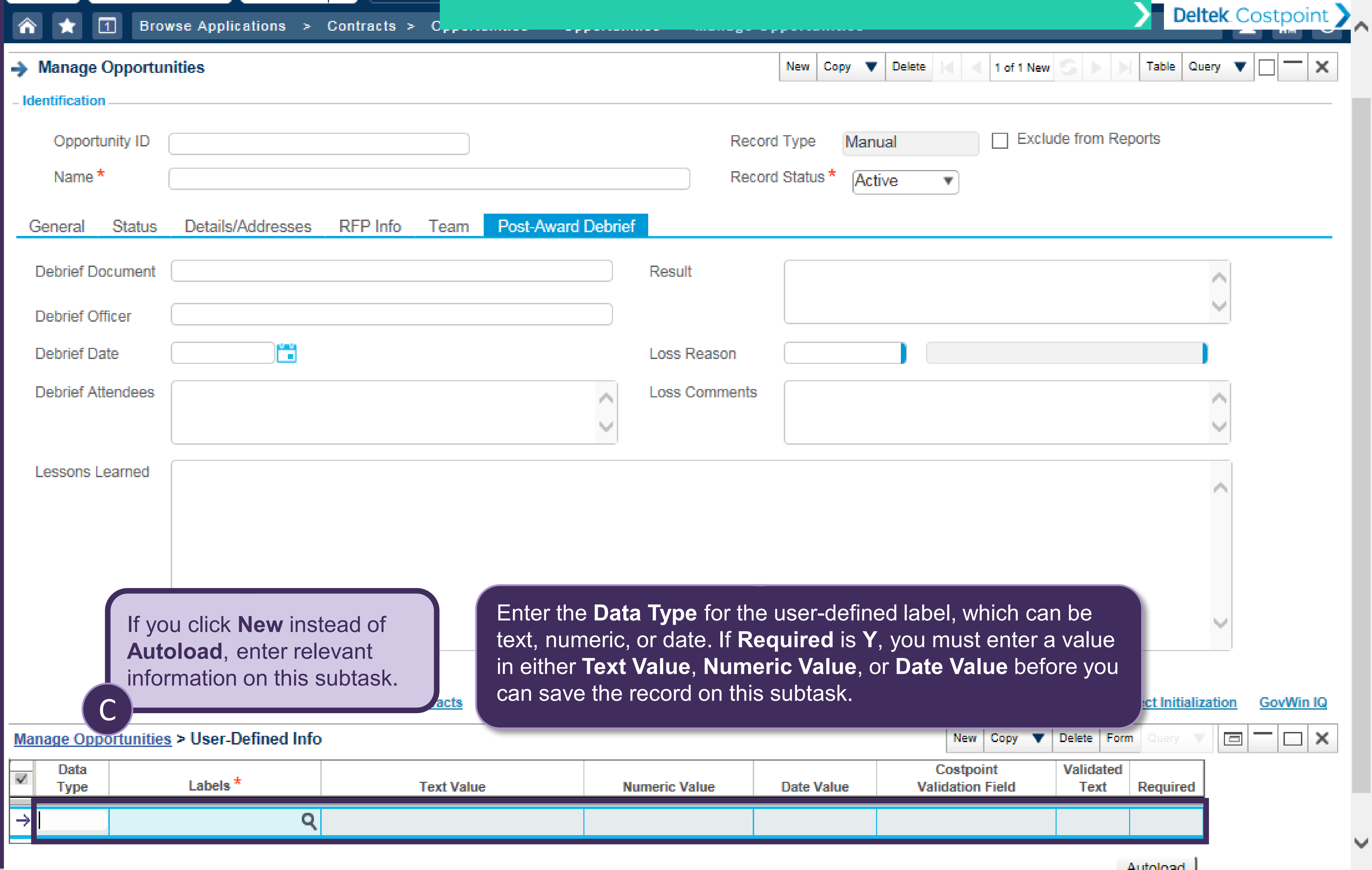

C

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.

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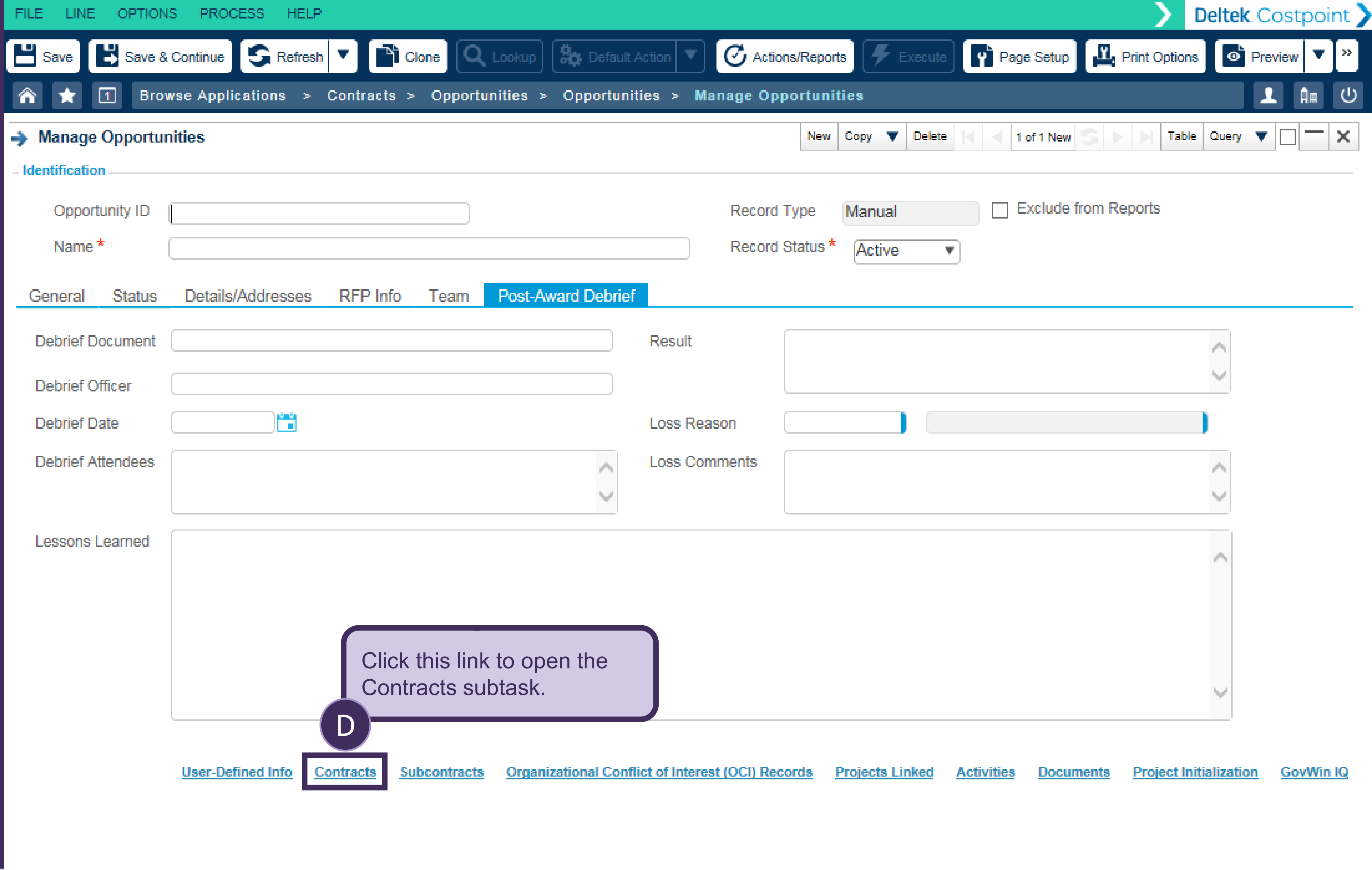

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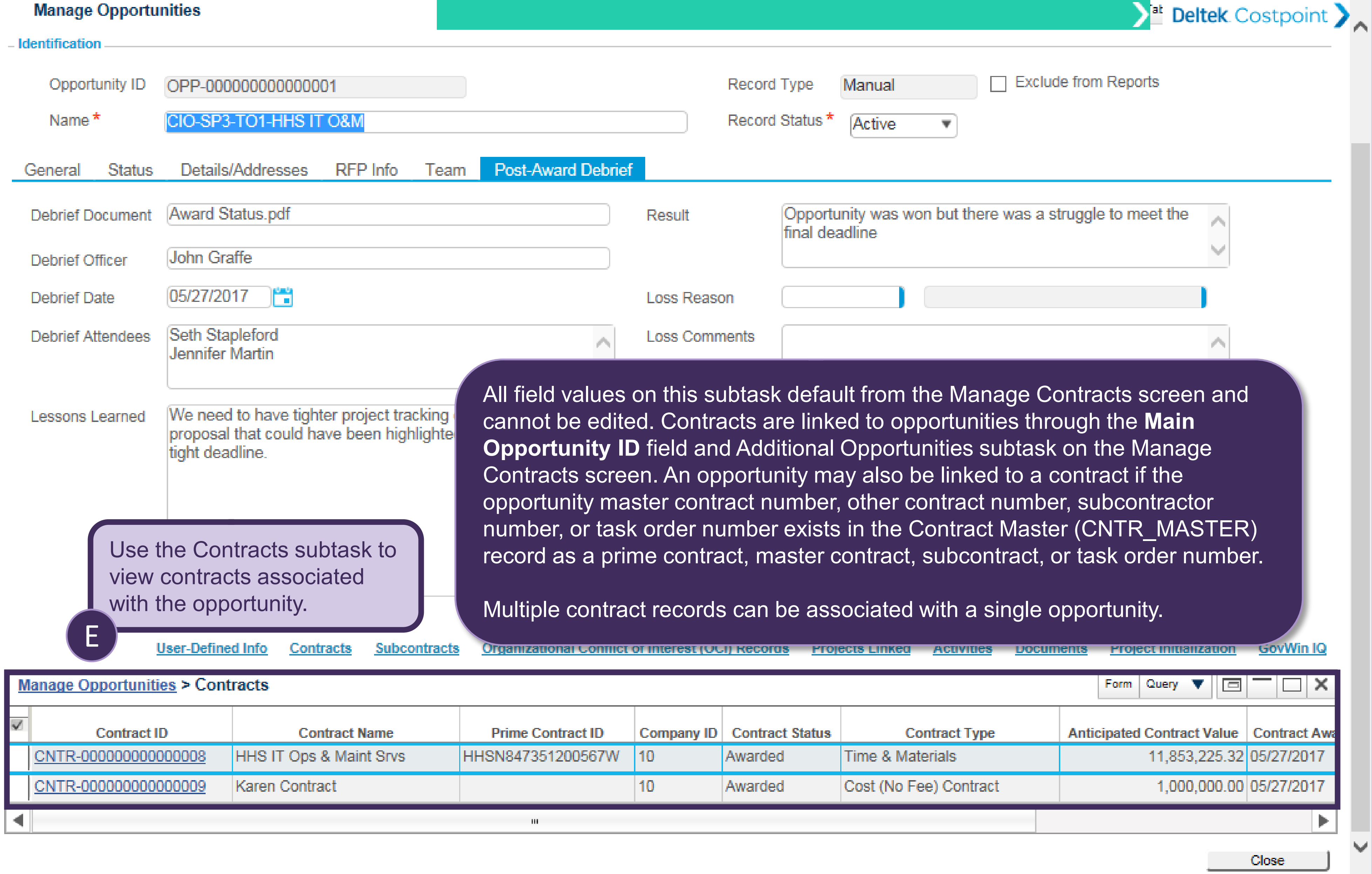

E

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.

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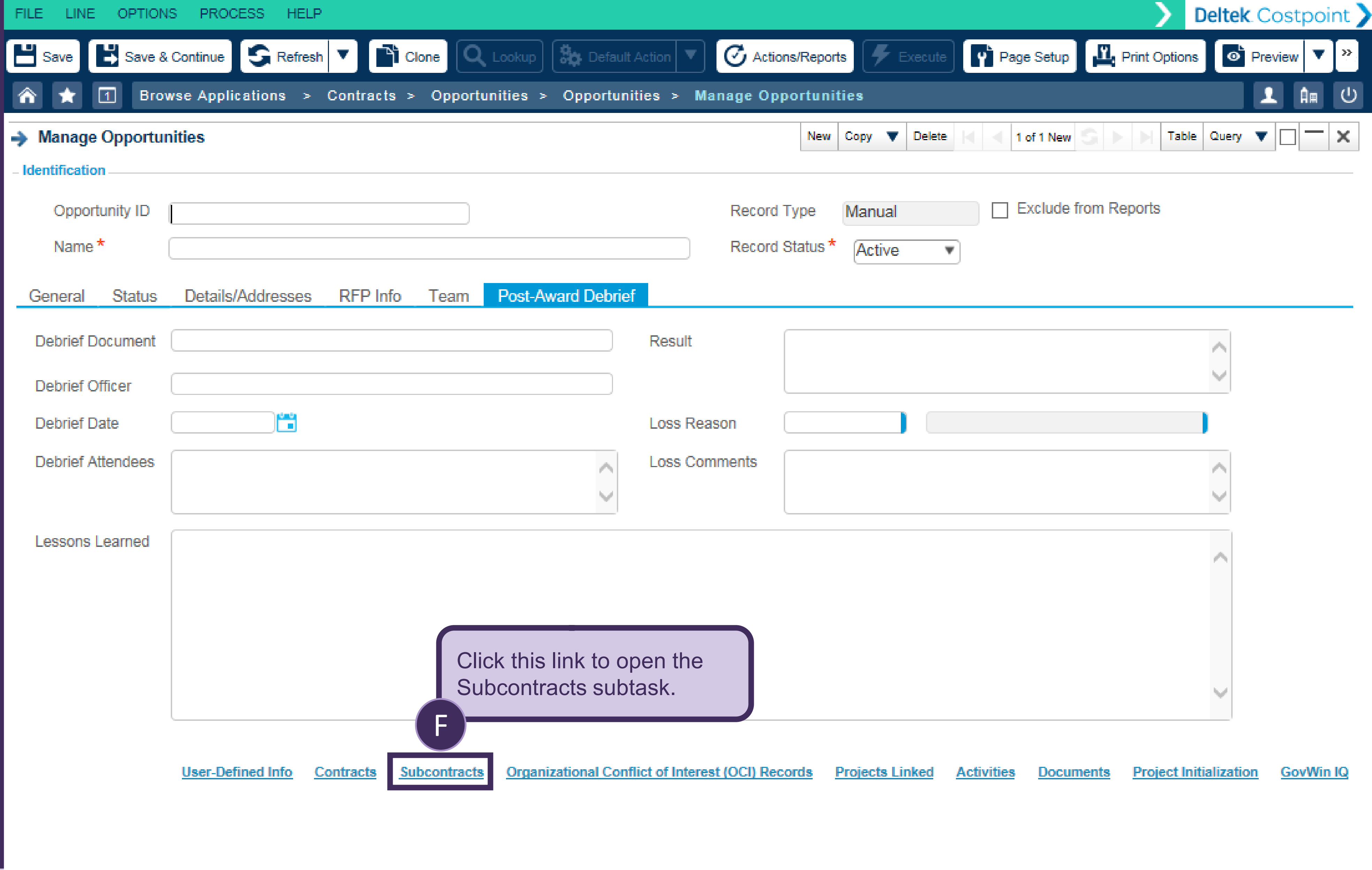

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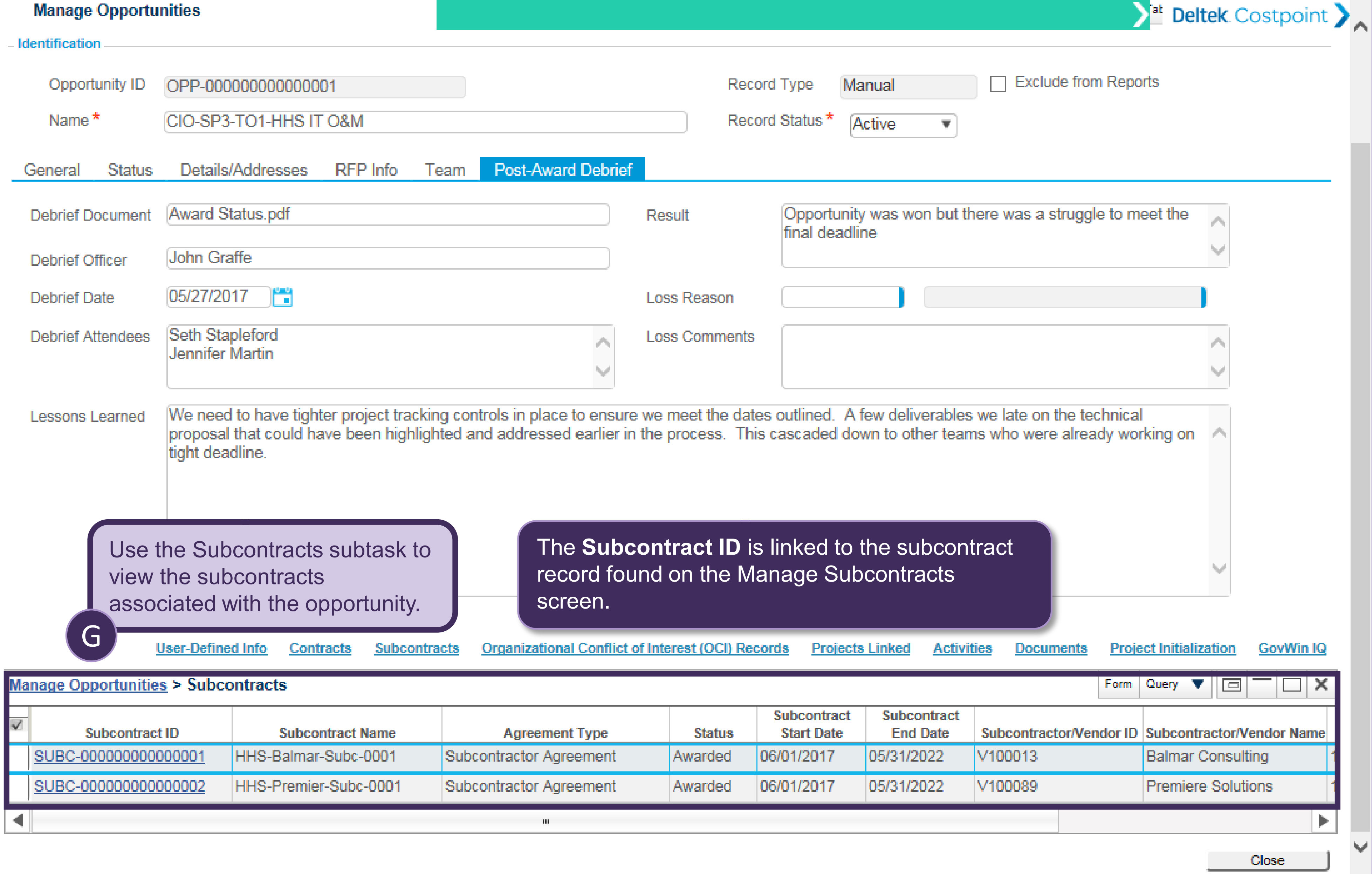

Use the Subcontracts subtask to view the subcontracts associated with the opportunity.

G

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

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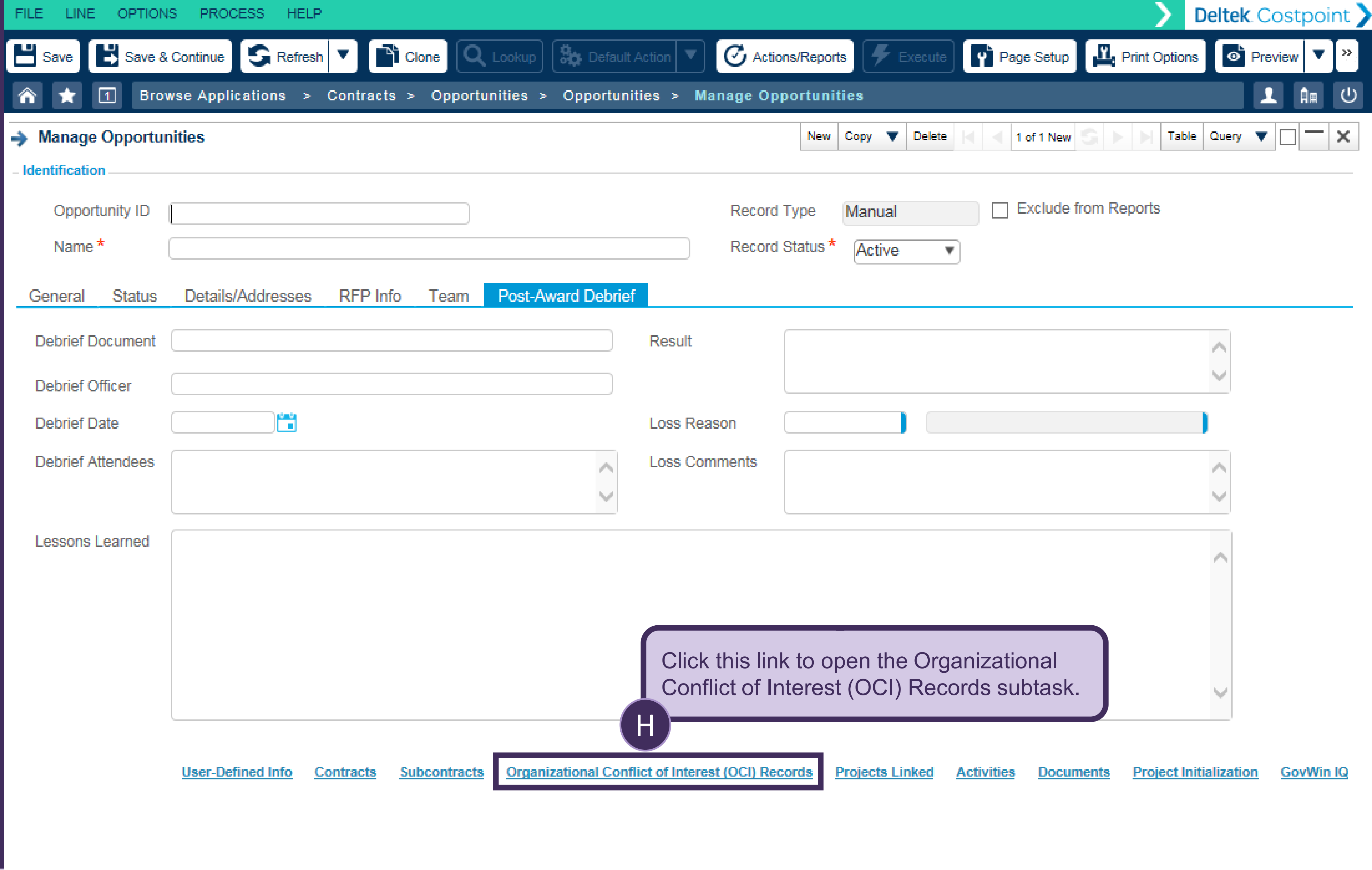

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Identification

Deltek Costpoint

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

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 tight deadline.

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.

I

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

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
OCI-000000000000008	Impaired Objectivity	W56HZV-05-C-1112		12/31/2013		☐	☐	
OCI-000000000000012	HHS - Personal Col		HHSN847381200567W		Cleared	☐	☐	
OCI-000000000000016	Applied Technologies Inc Company1					☐	☐	

Close

Manage Opportunities Overview

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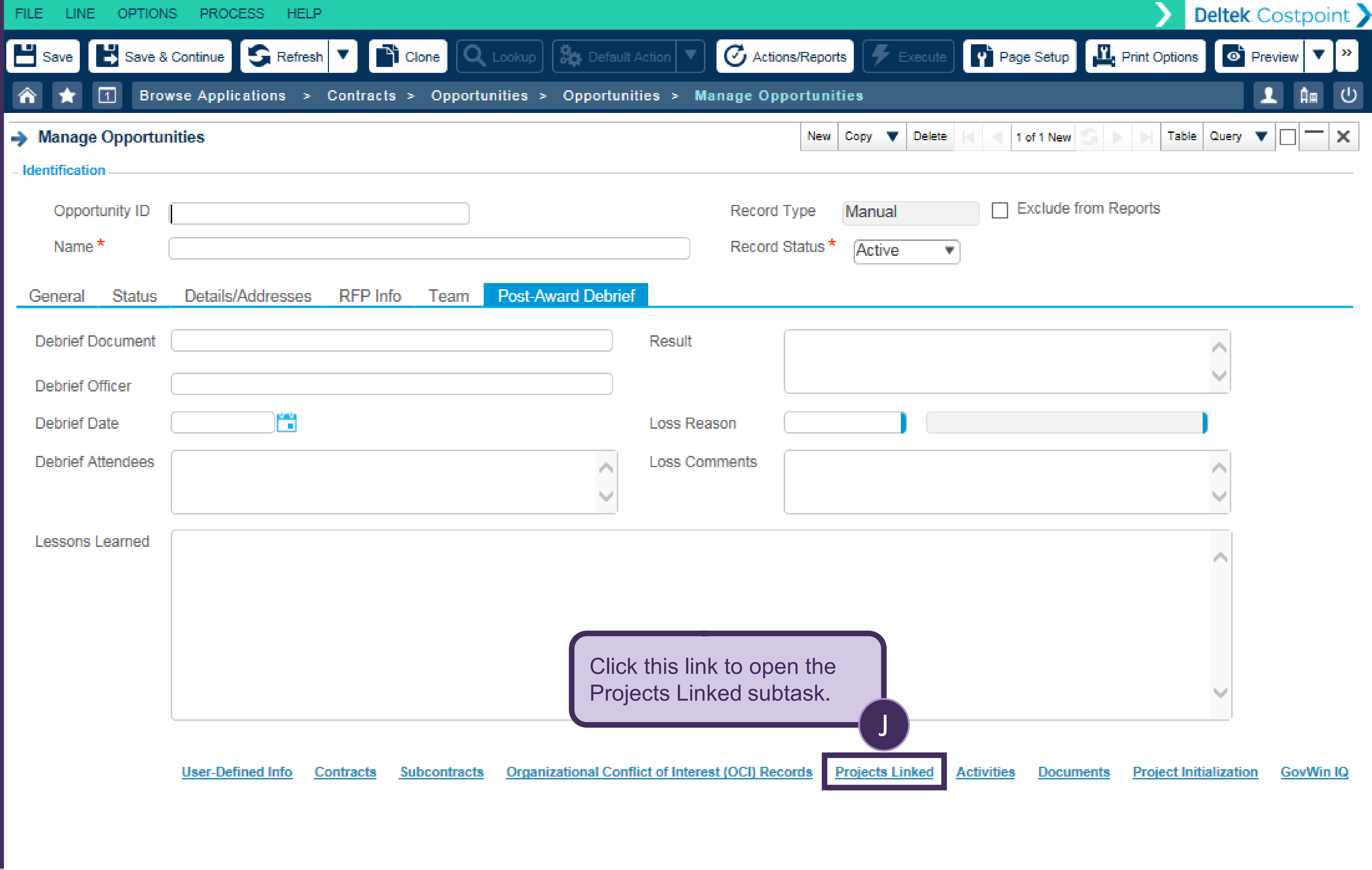

Manage Opportunities Overview

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Deltek Costpoint

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 addresse tight deadline.

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.

K

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

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 Va
+	10008	10008	961390	Anderson, Eve	DIRECT PROJECT	GOVERNMENT	0.00	0.00	0.00	0
+	10115	10115	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

Close

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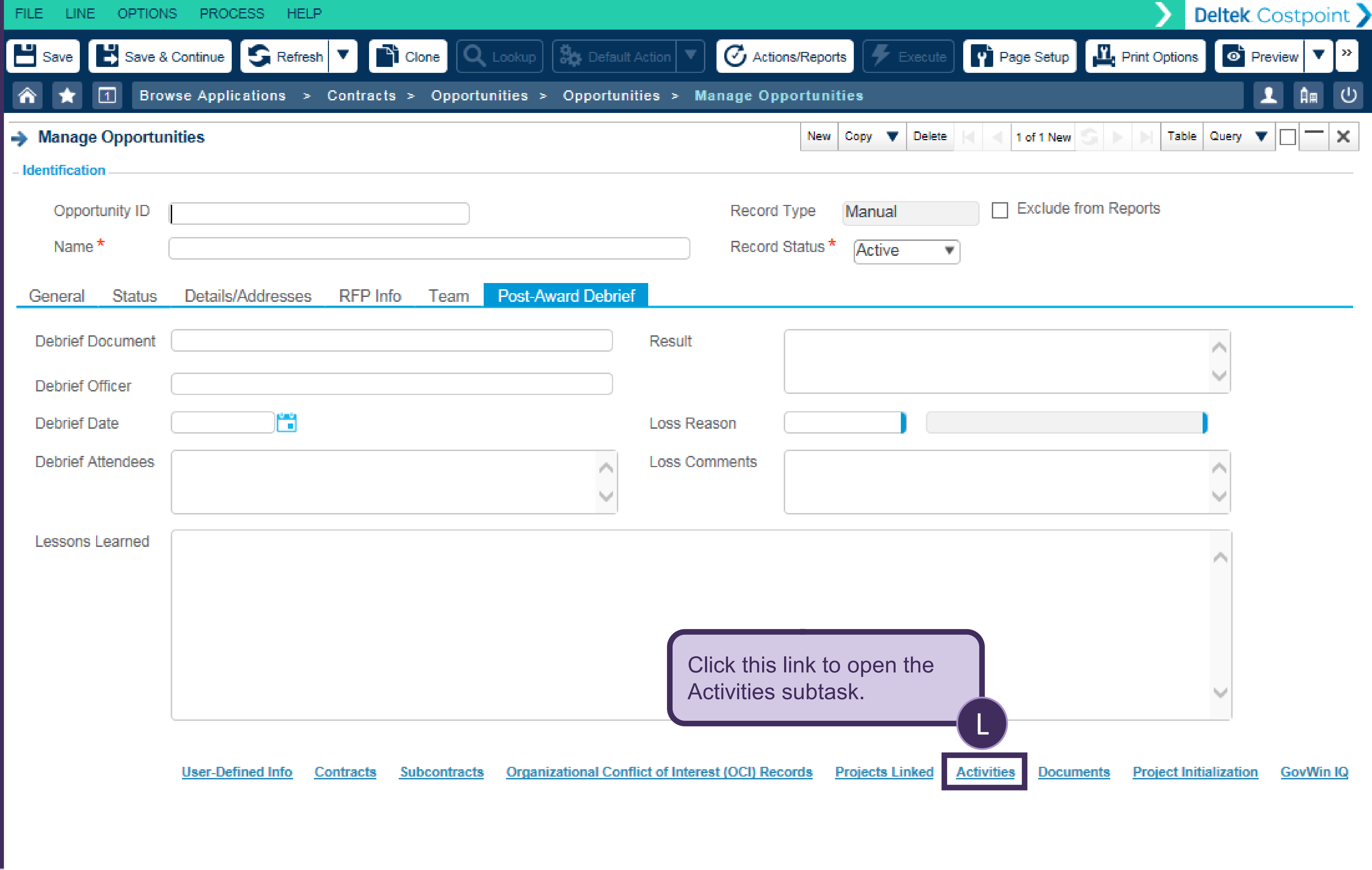

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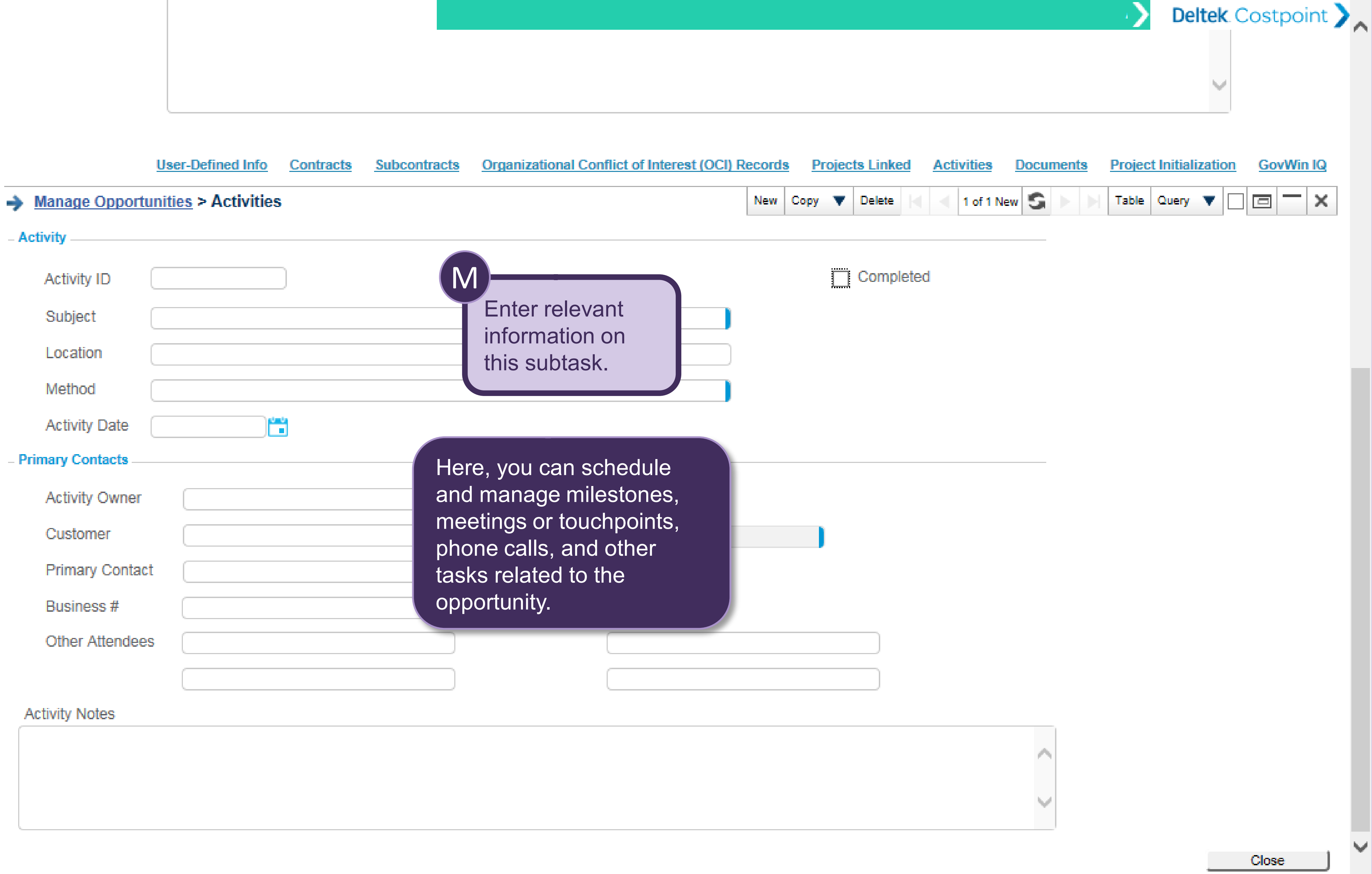

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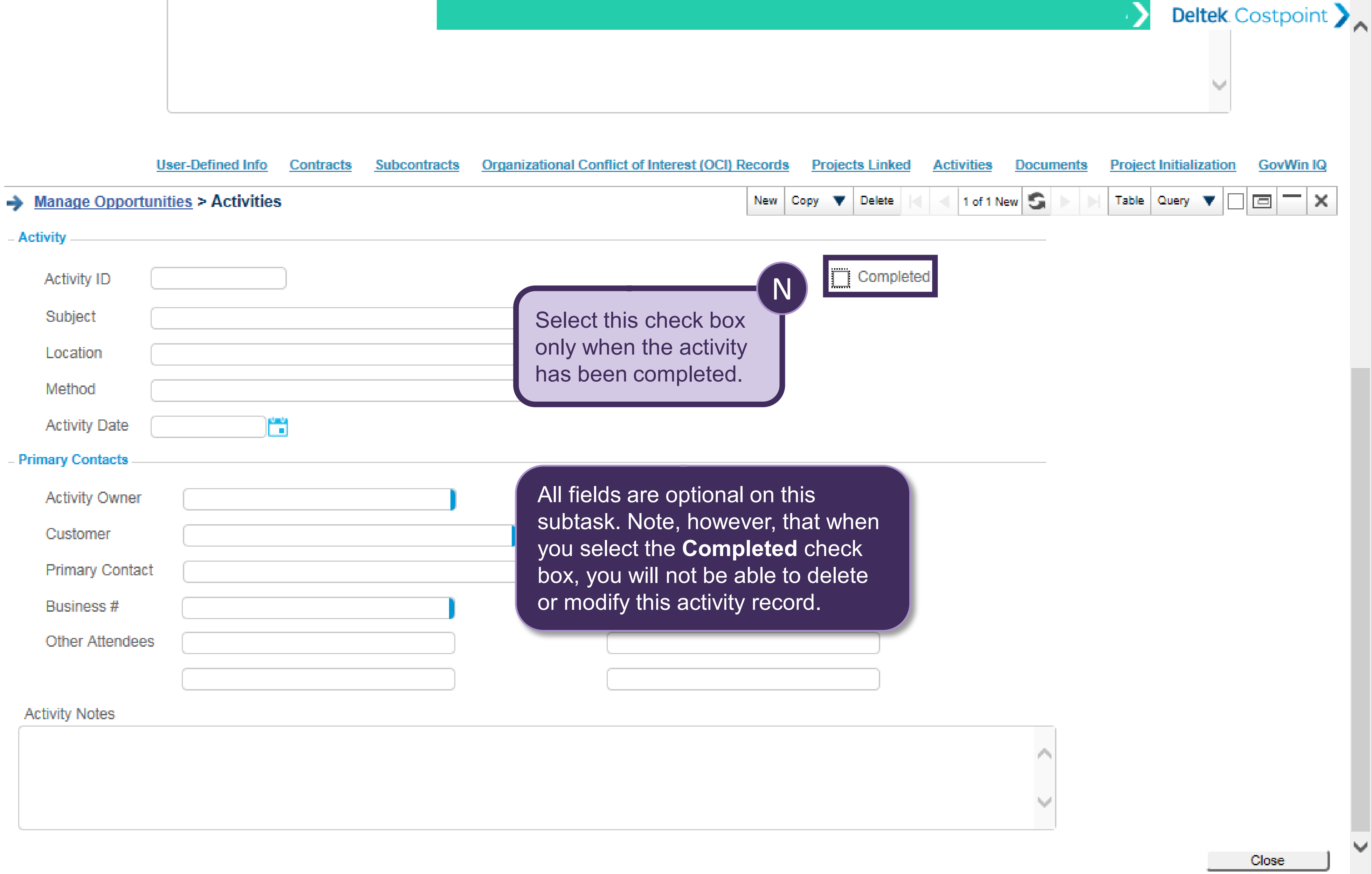

N

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

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.

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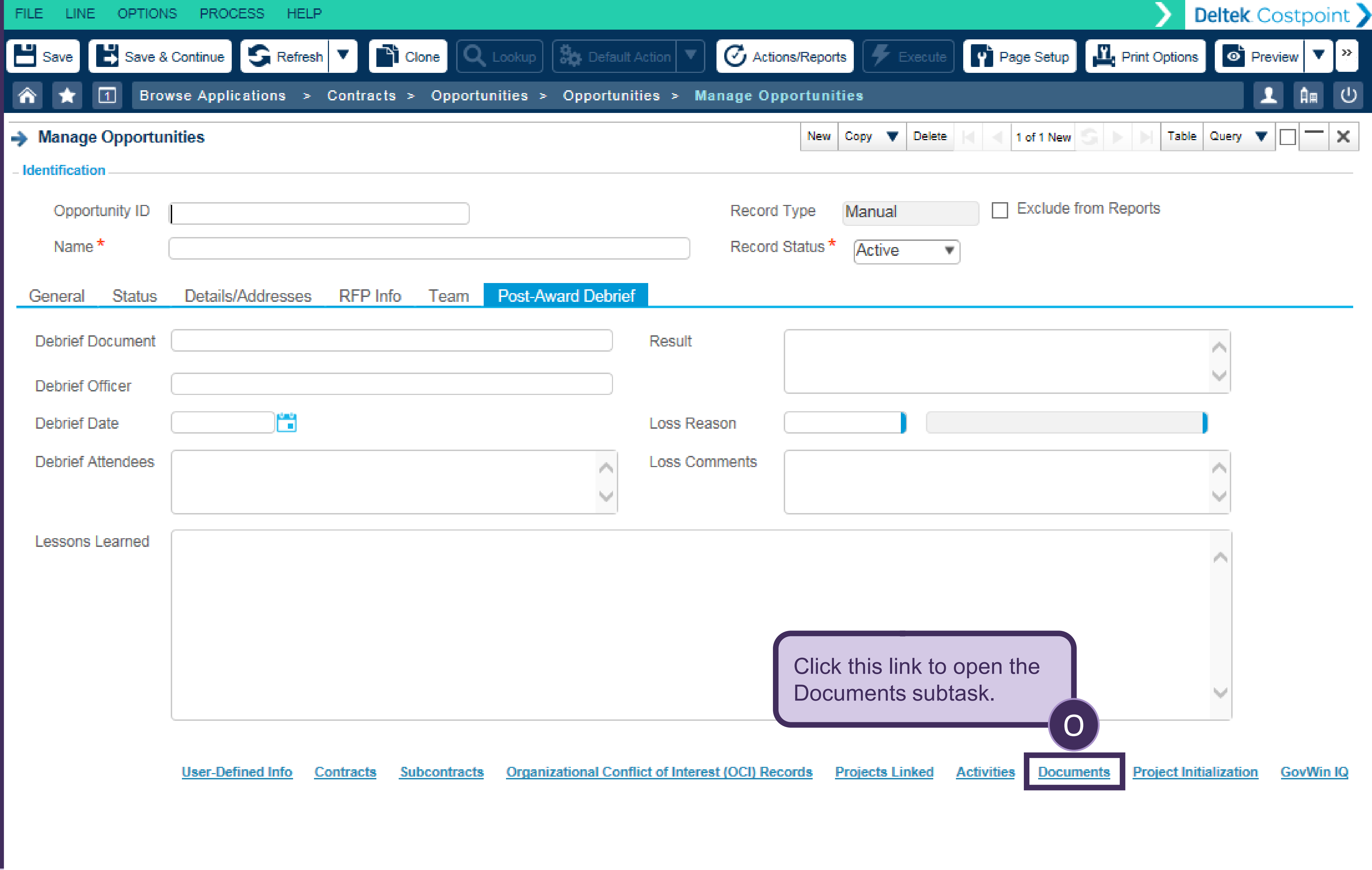

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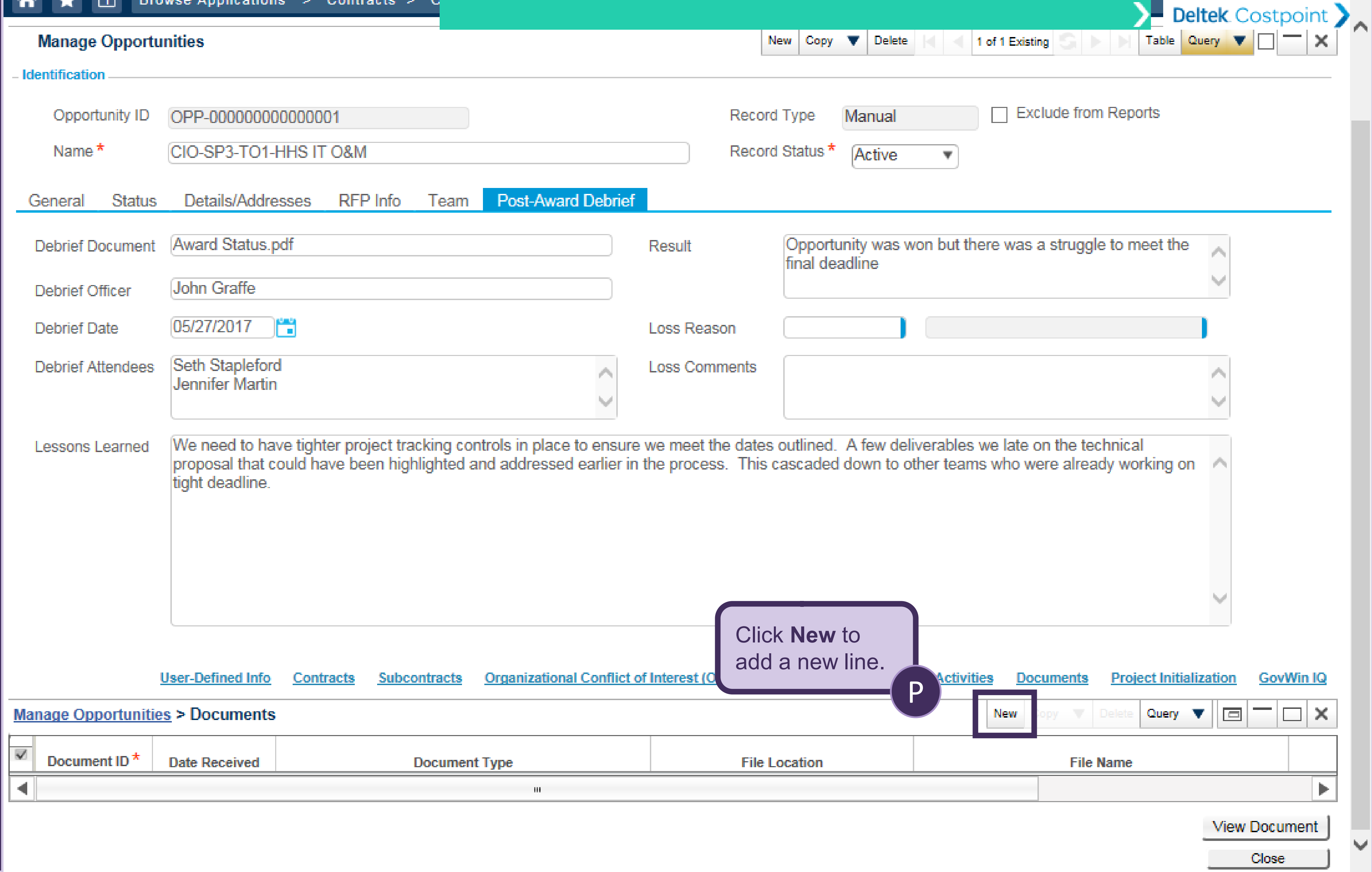
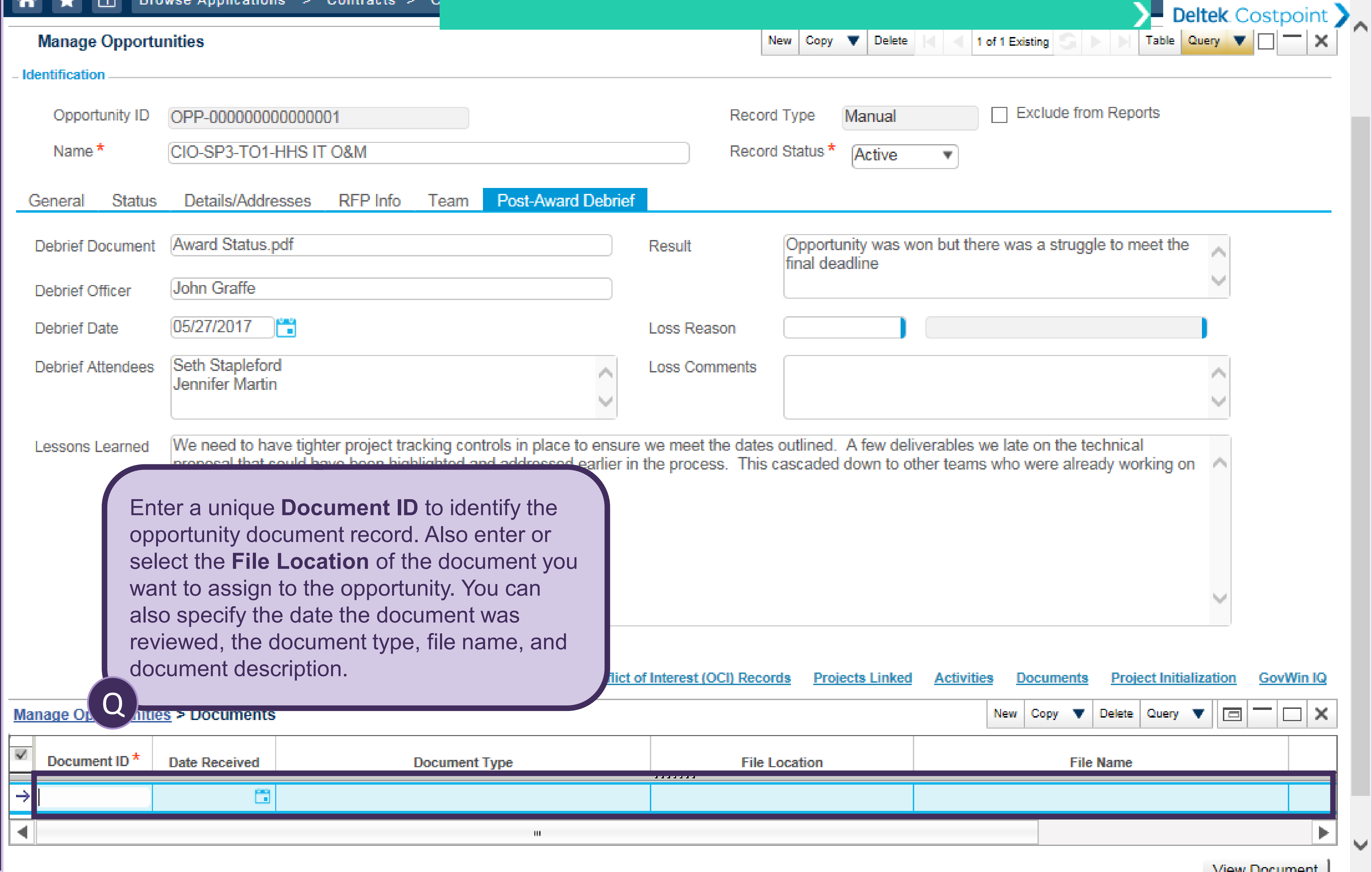


Manage Opportunities Overview

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



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.

Q

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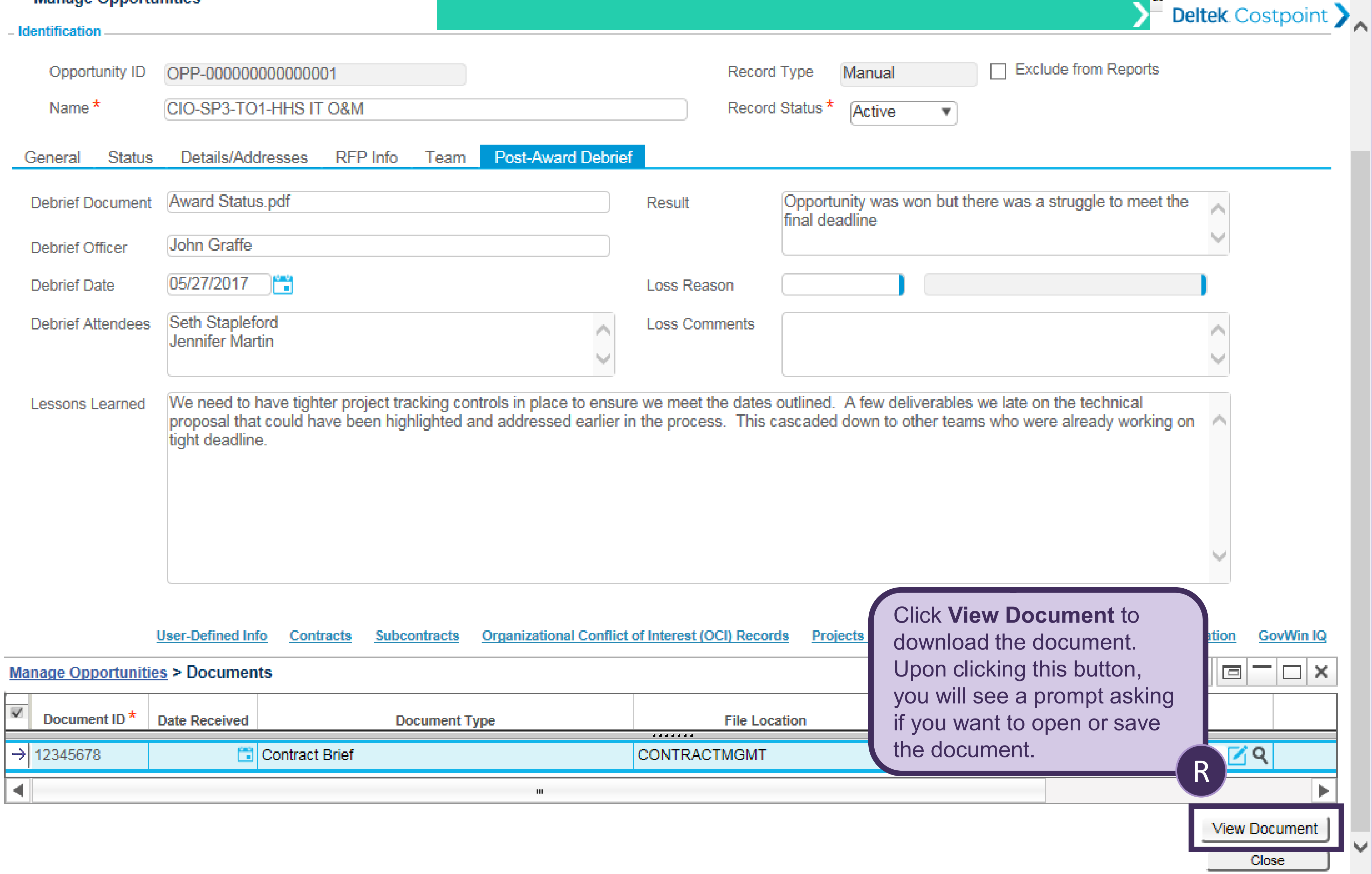

Click **View Document** to download the document. Upon clicking this button, you will see a prompt asking if you want to open or save the document.

R

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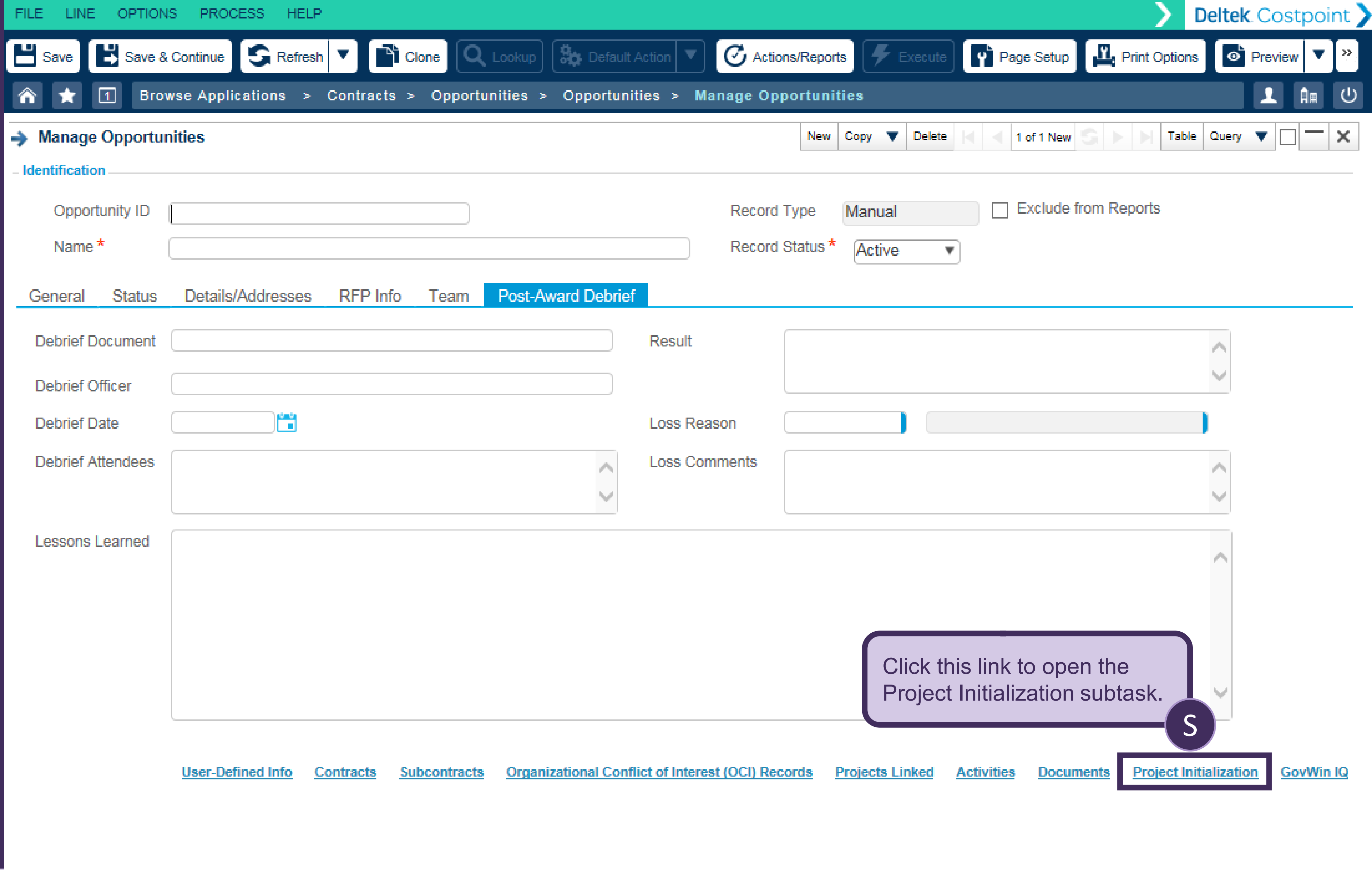

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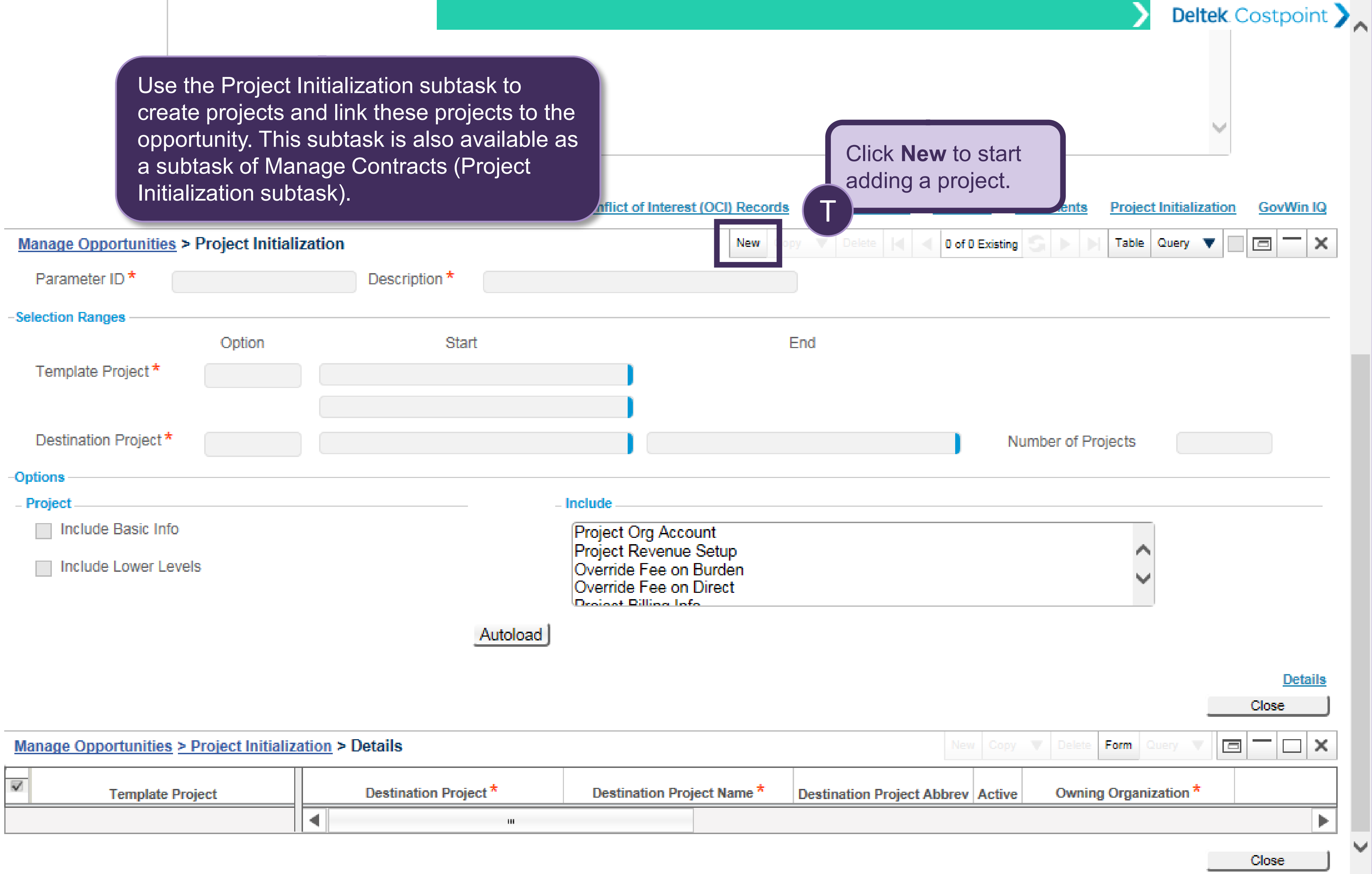
Use the Project Initialization subtask to create projects and link these projects to the opportunity. This subtask is also available as a subtask of Manage Contracts (Project Initialization subtask).

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



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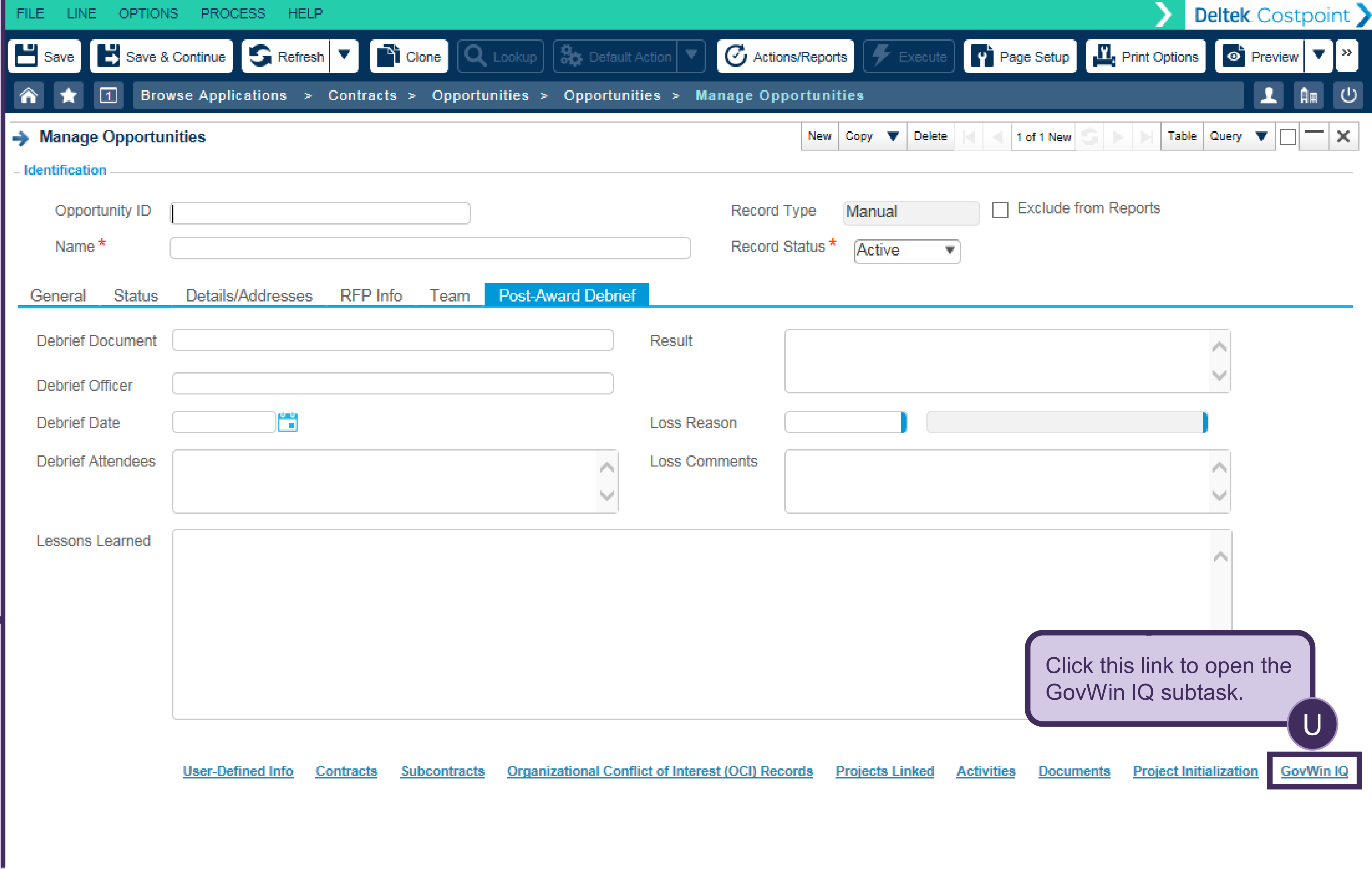

Manage Opportunities Overview

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Manage Opportunities > GovWin IQ

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V

Use the GovWin IQ subtask to view detailed information about the opportunities imported from GovWin IQ or opportunities that are manually entered in Manage Opportunities and have a corresponding GovWin IQ opportunity ID.

Identification

Opportunity ID: MTCLO

Name: 2011 VA

Record Type: GovWin IQ

Refresh from IQ

Do Not Refresh

General

Last GovWin IQ Synch: 03/

Win IQ Analyst Update: 10/26/2012

Program Name: 2011

n IQ ID: OPP68185

Acronym: VAi2

Department: VETERANS AFFAIRS

Agency: OFFICE OF INFORMATION AND TECHNOLOGY

Current Status: Awarded

Details

Solicitation Number: VA11811RP0168

IQ Opportunity Link: http://www.fbo.gov

Estimated Value: 100,000.00

Duration: 24 month(s) base

Competition Type: Full and Open / Unrestricted

IQ Contract Type: Firm Fixed Price

NAICS Code: 541512 Computer Systems Design Services $27.5 million annual rece

Primary Offering: Research & Development

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: 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

Potential Bidders

Manage Opportunities Overview

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Current Status: Awarded

Details

Solicitation Number	VA11811RP0168	IQ Opportunity Link	http://www.fbo.gov
Estimated Value	100,000.00	Duration	24 month(s) base
Competition Type	Full and Open / Unrestricted	IQ Contract Type	Firm Fixed Price
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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 Awa further information regarding potential Awards. Carol Newcomb (\mailto:carol.newcomb@va.g

Program Description: SUMMARY:

Several vendors are fulfilling the Dep ... & Technology (OI&T) requirement for innovative ideas in specific areas of interest including the expansion of the capabilities of Blue Button technolog ... rilization of reusable medical equipment; teleaudiology; and

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

W

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

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3. Accomplish the Team Tab subtasks
4. Accomplish the main screen subtasks

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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 ... may be submitted for further information re... ort.		
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).		
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This concludes the
Manage Opportunities Overview click-thru.

GovWin IQ Key Dates | GovWin IQ Key Contacts | GovWin IQ Added By

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