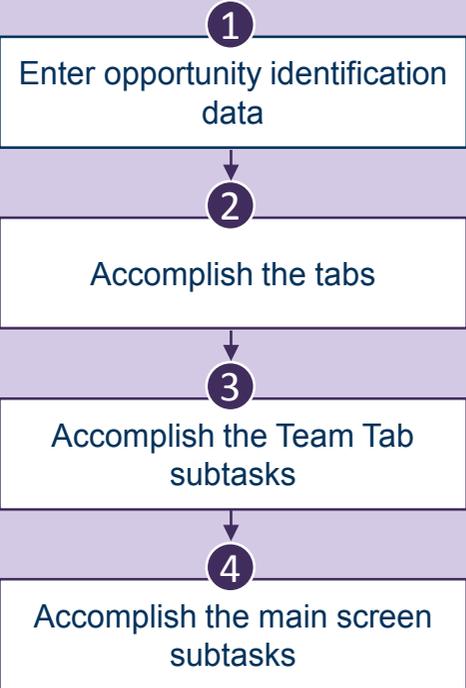


# Manage Opportunities Overview



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 \*

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.

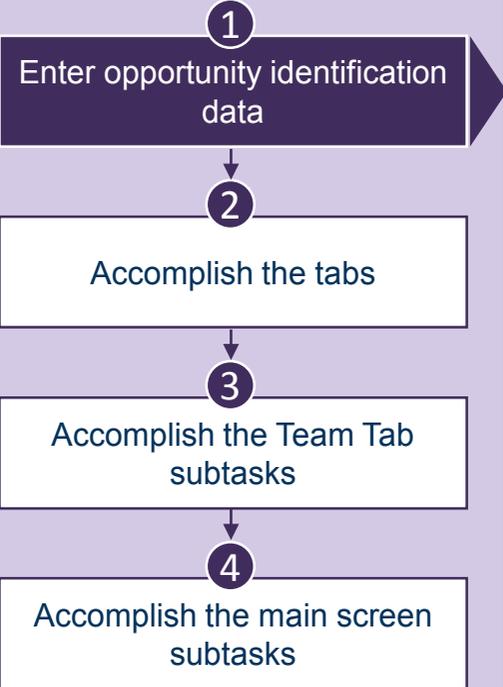
Click the numbered circles on the left to move to the first step in each phase.

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 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

**1** Enter opportunity identification data

**2** Accomplish the tabs

**3** Accomplish the Team Tab subtasks

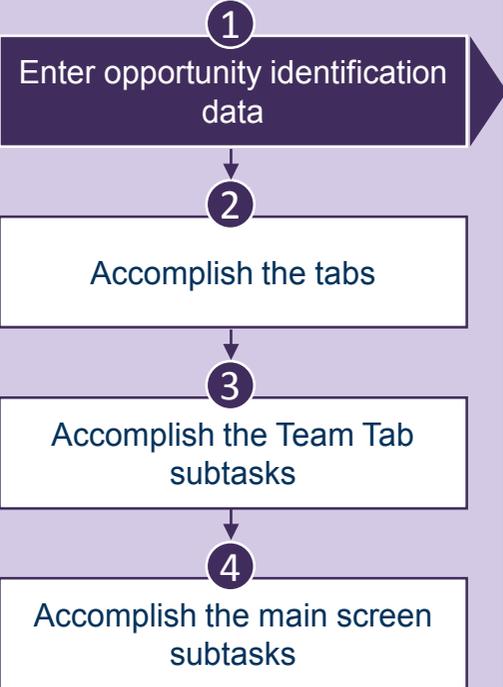
**4** Accomplish the main screen subtasks

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

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

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.

# 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

**1** Enter opportunity identification data

Opportunity ID  Record Type   Exclude from Reports

Name \*  Record Status \*

**2** Accomplish the tabs

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

**B** Enter the name of the opportunity.

**3** Accomplish the Team Tab subtasks

**4** Accomplish the main screen subtasks

**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.**

**Opportunity Info**

Number \*

Short Description \*

**Opportunity Roles**

Our Role/Responsibility

Prime Contractor

**Contract Information**

Contract Role/Type

Prime Contract No  Name

Task Order No

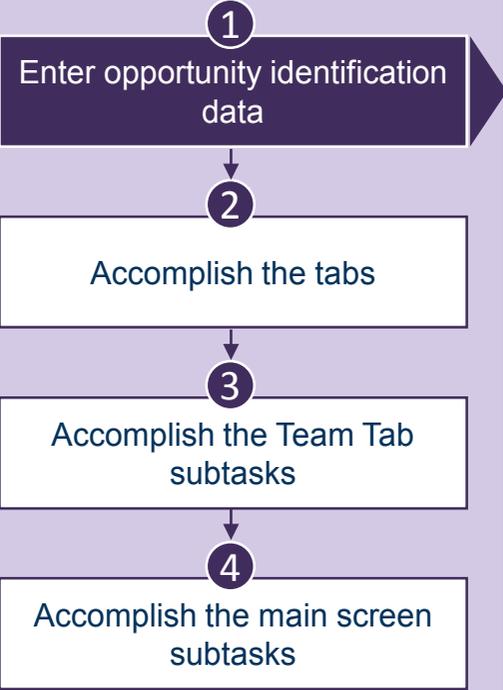
Master Contract No  Other Contract No

Subcontract No

Contract Vehicle

Primary Work Location

# 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

Name \*

Record Type **Manual**  Exclude from Reports

Record Status \* **Active**

**General** Status Details/Address

**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

**C** 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

1 Enter opportunity identification data

2 Accomplish the tabs

3 Accomplish the Team Tab subtasks

4 Accomplish the main screen subtasks

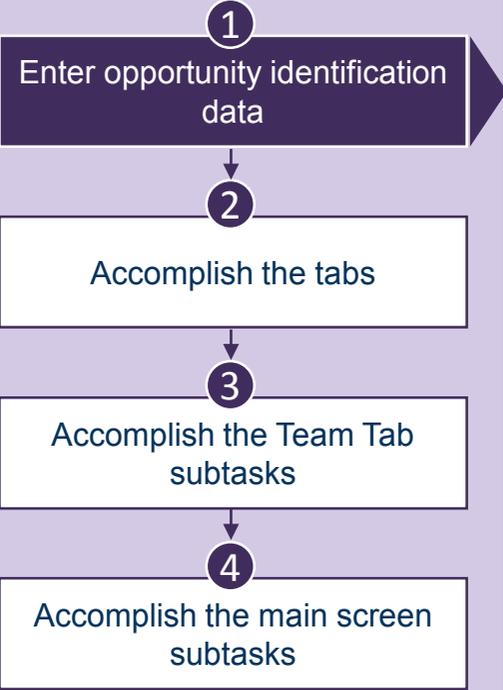
D Select the record status of the opportunity. Valid values are **Active** and **Inactive**.

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



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 \*  Record Status \*

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

**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

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

# Manage Opportunities Overview

1 Enter opportunity identification data

2 Accomplish the tabs

3 Accomplish the Team Tab subtasks

4 Accomplish the main screen subtasks

The screenshot shows the 'Manage Opportunities' interface in Deltek Costpoint. The breadcrumb trail is 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. The interface includes a top navigation bar with buttons for Save, Save & Continue, Refresh, Clone, Lookup, Default Action, Actions/Reports, Execute, Page Setup, Print Options, and Preview. Below the breadcrumb is a toolbar with 'New', 'Copy', 'Delete', and navigation arrows. The main content area is divided into several sections: 'Identification' (Opportunity Number, Name), 'Opportunity Info' (Number, Short Description), 'Opportunity Role' (Our Role, Prime Contractor, Type), and 'Contract Information' (Contract Role/Type, Prime Contract No, Task Order No, Master Contract No, Subcontract No, Contract Vehicle, Primary Work Location). A 'General' tab is selected, and a 'Details/Addresses' tab is also visible. A callout box labeled 'A' points to the 'Name' field with the text 'Fill out the General tab.' Another callout box states '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.' A third callout box says 'Follow the steps on the next slides to accomplish the tabs.'

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

The screenshot shows the 'Manage Opportunities' interface in Deltek Costpoint. The breadcrumb trail is 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. The interface includes a toolbar with actions like Save, Save & Continue, Refresh, Clone, Lookup, Default Action, Actions/Reports, Execute, Page Setup, Print Options, and Preview. Below the toolbar, there are navigation buttons for 'New', 'Copy', 'Delete', and a record count of '1 of 1 New'. The main content area is divided into several sections: 'Identification' with fields for Opportunity ID, Name, Record Type (Manual), Record Status (Active), and an 'Exclude from Reports' checkbox; 'General' (selected), 'Status', 'Details/Addresses', 'RFP Info', 'Team', and 'Post-Award Debrief' tabs; 'Opportunity Info' with fields for Number and Short Description; 'Opportunity Roles' with a field for 'Our Role/Responsibility'; and 'Contract Information' with fields for Prime Contractor, Contract Role/Type, Prime Contract No, Task Order No, Master Contract No, Other Contract No, Subcontract No, Contract Vehicle, and Primary Work Location. Annotations include a purple box labeled 'B' pointing to the 'Number' and 'Short Description' fields with the text 'Enter the opportunity's identifying number and description from its source.', and a dark purple box pointing to the 'Number' and 'Short Description' fields with the text '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

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

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 Name \* **C** Enter relevant information on the Status tab.

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.

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

1 Enter opportunity identification data

2 Accomplish the tabs

3 Accomplish the Team Tab subtasks

4 Accomplish the main screen subtasks

The screenshot shows the 'Manage Opportunities' interface in Deltek Costpoint. The top navigation bar includes 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. Below this is a toolbar with buttons for 'Save', 'Save & Continue', 'Refresh', 'Clone', 'Lookup', 'Default Action', 'Actions/Reports', 'Execute', 'Page Setup', 'Print Options', and 'Preview'. The breadcrumb trail reads 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. The main content area is titled 'Manage Opportunities' and has tabs for 'General', 'Status', 'Details/Addresses', 'RFP Info', and 'Team'. The 'Status' tab is active. The 'Identification' section contains 'Opportunity ID' and 'Name \*' fields. The 'Opportunity Status' section includes 'Stage \*', 'Date Changed \*' (with a calendar icon), 'Type', 'Source', 'NAICS (primary)', 'NAICS (supporting)', 'Website', 'Estimated Start Date (contract)', 'Contract Period of Performance Months', 'Estimated Completion Date', and 'Notes'. Callout 'D' points to the 'Stage \*' field, and callout 'E' points to the 'Date Changed \*' field. A large callout box on the right explains the valid values for the 'Stage \*' field and the description of the unlabeled field to its right.

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.

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

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  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

The screenshot shows the 'Manage Opportunities' interface in Deltek Costpoint. The breadcrumb trail is: Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities. The interface includes a top navigation bar with buttons for Save, Save & Continue, Refresh, Clone, Lookup, Default Action, Actions/Reports, Execute, Page Setup, Print Options, and Preview. Below the breadcrumb is a toolbar with 'New', 'Copy', 'Delete', and '1 of 1 New' options, along with 'Table' and 'Query' dropdowns. The main content area is divided into sections: 'Identification' with fields for 'Opportunity ID' and 'Name \*'; 'Additional Details' with fields for 'Long Name', 'Full Description', and 'Key words'; and 'Addresses' with columns for 'Primary Agency/Customer', 'Acquisition Agency/Customer', and 'Prime Contractor', each with an 'Agency Name' field. A grid of 10 'Label' fields (Label 1 to Label 10) is also present. A callout box with a purple background and white text says: 'Use this tab to enter additional details for the opportunity, as well as address and contact information for primary and acquisition agencies linked to the opportunity.' Another callout box with a purple border and white text says: 'Enter relevant information on the Details/Addresses tab.' A circular callout with the letter 'F' is positioned over the 'Name \*' field. On the left side, a vertical flowchart with four steps is overlaid on the screenshot.

# 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   Exclude from Reports

Name\*  Record Status\*

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

**Additional Details**

Long Name

Full Description

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.

Label 1	<input type="text"/>	Label 6	<input type="text"/>
Label 2	<input type="text"/>	Label 7	<input type="text"/>
Label 3	<input type="text"/>	Label 8	<input type="text"/>
Label 4	<input type="text"/>	Label 9	<input type="text"/>
Label 5	<input type="text"/>	Label 10	<input type="text"/>

**Addresses**

Agency Name Primary Agency/Customer Acquisition Agency/Customer Prime Contractor

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

The screenshot shows the 'Manage Opportunities' application interface. At the top, there is a navigation bar with 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP' menus. Below this is a toolbar with buttons for 'Save', 'Save & Continue', 'Refresh', 'Clone', 'Lookup', 'Default Action', 'Actions/Reports', 'Execute', 'Page Setup', 'Print Options', and 'Preview'. The breadcrumb trail reads 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. The main content area is titled 'Manage Opportunities' and includes a toolbar with 'New', 'Copy', 'Delete', and navigation arrows. The 'RFP Info' tab is selected, showing fields for 'Opportunity ID' and 'Name \*'. A callout box points to the 'Name \*' field with the text 'Enter relevant information on the RFP Info tab.' Another callout box on the right says 'Use this tab to enter and track key milestone dates for the opportunity and identify contract provisions.' Below the tabs are sections for 'Key Milestones' (with date pickers for RFI Date, Draft RFP Due Date, Expected RFP Release, Bidders Conference, Subc Kickoff, Pink Team Review, Red Team Review, Gold Team Review, Proposal Due Date, BAFO Date, Award Date, and RFP Date 12) and 'Provisions' (with checkboxes for Teaming Agreement, Subcontract Plan Submitted, DD254 Required, Service Contract Act, Davis Bacon Act, Hiring Restrictions, and Hiring Restriction Remarks, Status, and Set Asides). A 'Details' section at the bottom has a checkbox for 'Request Bid & Proposal Project Setup' and a 'Notify' field. At the very bottom, there are links for 'User-Defined Info', 'Contracts', 'Subcontracts', 'Organizational Conflict of Interest (OCI) Records', 'Projects Linked', 'Activities', 'Documents', 'Project Initialization', and 'GovWin IQ'.

# 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

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\*  Record Status\* **Active**

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

**Key Milestones**

RFI Date	<input type="text"/>	Subc Kickoff	<input type="text"/>	Proposal Due Date	<input type="text"/>
Draft RFP Due Date	<input type="text"/>	Pink Team Review	<input type="text"/>	BAFO Date	<input type="text"/>
Expected RFP Release	<input type="text"/>	Red Team Review	<input type="text"/>	Award Date	<input type="text"/>
Bidders Conference	<input type="text"/>	Gold Team Review	<input type="text"/>	RFP Date 12	<input type="text"/>

**Provisions**

Service Contract Act

Davis Bacon Act

**Details**

Request Bid & Proposal Project Setup Notify

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

1  
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

1  
Enter opportunity identification data

2  
Accomplish the tabs

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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

Name\*   Exclude from Reports

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

Debrief Document  Result

Debrief Officer

Debrief Date

Debrief Attendees

Lessons Learned

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.

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

The screenshot shows the 'Manage Opportunities' web application interface. At the top, there is a navigation bar with the breadcrumb path: 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. Below this, the 'Manage Opportunities' section is visible, with a sub-section for 'Identification' containing input fields for 'Opportunity ID' and 'Name \*'. A callout box with a 'K' icon points to the 'Name \*' field, stating: 'Enter relevant information on the Team tab.' Another callout box on the right side of the page states: '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.'

The 'Team' tab is selected, showing three sub-sections:

- Team > Opportunity Employee Team**: A table with columns: Employee \*, Name, Title, Role Description. A 'Close' button is present.
- Team > Potential Work Force Employees**: A table with columns: Employee \*, Name, Title, Role Description, Include in Work Force, ITAR, U.S. Citizen. A 'Close' button is present.
- Team > Opportunity Teammates/Competitors**: A table with columns: Teammate/Competitor \*, Type \*, ID \*, Name, Role Description, Include in Wo. A 'Close' button is present.

At the bottom right, there is a link for 'Vendor Employees' and another 'Close' button.

# 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 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

1 of 1 New

Identification

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

Record Status \* **Active**

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.

**A**

[Link Force Employees](#) [Opportunity Teammates/Competitors](#)

**Team > Opportunity Employee Team**

<input checked="" type="checkbox"/>	Employee *	Name	Title	Role Description
-------------------------------------	------------	------	-------	------------------

**New** Copy Delete Query

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

The screenshot shows the 'Manage Opportunities' interface in Deltak Costpoint. At the top, there is a navigation bar with 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. Below this is a sub-header 'Manage Opportunities' with a '1 of 1 New' indicator. The main area is divided into sections: 'Identification' with fields for 'Record Type' (Manual), 'Record Status' (Active), and 'Exclude from Reports'; 'Post-Award' with a 'New' button; and 'Team > Potential Work Force Employees' with a table and another 'New' button. Callout boxes provide instructions: one points to the 'New' button in the 'Post-Award' section, and another points to the 'New' button in the 'Team' section. A third callout box explains the purpose of the 'Potential Work Force Employees' subtask.

Use the Potential Work Force Employees subtask to associate the opportunity with employees that may be included in the proposal for the future contract award and define their roles. You can assign the same role to multiple employees.

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

**B**

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

# 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 1 of 1 New

Record Type   Exclude from Reports

Record Status \*

Post-Award

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

**C**

Team > Opportunity Teammates/Competitors

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

Vendor Employees 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

The screenshot shows the 'Manage Opportunities' web application interface. At the top, there is a navigation bar with 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. Below this is a form for 'Identification' with fields for 'Opportunity ID', 'Name \*', 'Record Type' (set to 'Manual'), and 'Record Status \*' (set to 'Active'). There is also an 'Exclude from Reports' checkbox. Below the form are several tabs: 'General', 'Status', 'Details/Addresses', 'RFP Info', 'Team' (which is selected), and 'Post-Award Debrief'. Under the 'Team' tab, there is a sub-tab 'Team > Opportunity Teammates/Competitors'. This sub-tab contains a table with columns: 'Teammate/Competitor', 'Type \*', 'ID \*', and 'Name'. The 'Subcontractor' option is selected in the 'Type' dropdown. A callout box 'D' points to this dropdown with the text: 'If you are adding a subcontractor on the Opportunity Teammates/Competitors subtask, click the Vendor Employees subtask to add vendor employees for the subcontractor.' Below the table, there is another sub-tab 'Team > Opportunity Teammates/Competitors > Vendor Employees'. This sub-tab contains a table with columns: 'Vendor ID', 'Type', 'Vendor Name', 'Employee Name', and 'Role Description'. A callout box 'E' points to a 'New' button in the top right of this sub-tab with the text: 'On the Vendor Employees subtask, click New to start adding vendor employees.' At the bottom of the screenshot, a large callout box contains the text: '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.'

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

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
Accomplish the Team Tab subtasks

4  
Accomplish the main screen subtasks

The screenshot displays the 'Manage Opportunities' application interface. At the top, there is a menu bar with 'FILE', 'LINE', 'OPTIONS', 'PROCESS', and 'HELP'. Below this is a toolbar with icons for 'Save', 'Save & Continue', 'Refresh', 'Clone', 'Lookup', 'Default Action', 'Actions/Reports', 'Execute', 'Page Setup', 'Print Options', and 'Preview'. The breadcrumb navigation shows the path: 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. The main title is 'Manage Opportunities', with a toolbar for 'New', 'Copy', 'Delete', and navigation controls. The 'Identification' section contains fields for 'Opportunity ID', 'Name\*', 'Record Type' (set to 'Manual'), 'Record Status\*' (set to 'Active'), and an 'Exclude from Reports' checkbox. Below this are tabs for 'General', 'Status', 'Details/Addresses', 'RFP Info', 'Team', and 'Post-Award Debrief'. The 'Post-Award Debrief' tab is active, showing fields for 'Debrief Document', 'Debrief Officer', 'Debrief Date' (with a calendar icon), 'Debrief Attendees', and 'Lessons Learned'. A dark purple callout box is overlaid on the 'Debrief Document' field, containing the text: '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.' At the bottom, there is a footer with links: 'User-Defined Info', 'Contracts', 'Subcontracts', 'Organizational Conflict of Interest (OCI) Records', 'Projects Linked', 'Activities', 'Documents', 'Project Initialization', and 'GovWin IQ'.

# Manage Opportunities Overview

1  
Enter opportunity identification data

2  
Accomplish the tabs

3  
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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\*  Record Status\* **Active**

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

Debrief Document  Result

Debrief Officer

Debrief Date  Loss Reason

Debrief Attendees  Loss Comments

Lessons Learned

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

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

# Manage Opportunities Overview

1 Enter opportunity identification data

2 Accomplish the tabs

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4 Accomplish the main screen subtasks

**Manage Opportunities** [New] [Copy] [Delete] [1 of 1 New] [Table] [Query] [Close]

**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  Result

Debrief Officer

Debrief Date  Loss Reason

Debrief Attendees  Loss Comments

**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] [Close]

<input checked="" type="checkbox"/>	Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
-------------------------------------	-----------	----------	------------	---------------	------------	----------------------------	----------------	----------

[Autoload] [Close]

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.



# Manage Opportunities Overview

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Enter opportunity identification data

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The screenshot shows the 'Manage Opportunities' web application interface. At the top, there is a navigation bar with the breadcrumb path: 'Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities'. Below this is a toolbar with various actions like 'New', 'Copy', 'Delete', and 'Table Query'. The main content area is titled 'Manage Opportunities' and contains an 'Identification' section with input fields for 'Opportunity ID', 'Name', 'Record Type' (set to 'Manual'), and 'Record Status' (set to 'Active'). There are also checkboxes for 'Exclude from Reports'. Below the identification section are several tabs: 'General', 'Status', 'Details/Addresses', 'RFP Info', 'Team', and 'Post-Award Debrief'. The 'Post-Award Debrief' tab is currently selected and contains several input fields: 'Debrief Document', 'Debrief Officer', 'Debrief Date', 'Debrief Attendees', 'Lessons Learned', 'Result', 'Loss Reason', and 'Loss Comments'. At the bottom of the page, there is a footer with several links: 'User-Defined Info', 'Contracts', 'Subcontracts', 'Organizational Conflict of Interest (OCI) Records', 'Projects Linked', 'Activities', 'Documents', 'Project Initialization', and 'GovWin IQ'. A callout box with a purple background and a white border points to the 'Contracts' link, containing the text: 'Click this link to open the Contracts subtask.' The callout box is labeled with a white letter 'D' inside a purple circle.

D  
Click this link to open the Contracts subtask.

[Contracts](#)

# Manage Opportunities Overview

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at **Deltak Costpoint**

**Manage Opportunities**

- Identification

Opportunity ID:  Record Type:   Exclude from Reports

Name\*:  Record Status\*:

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

Debrief Document:  Result:

Debrief Officer:

Debrief Date:  Loss Reason:

Debrief Attendees:  Loss Comments:

Lessons Learned:

**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 [ ] [ ] [X]

Contract ID	Contract Name	Prime Contract ID	Company ID	Contract Status	Contract Type	Anticipated Contract Value	Contract Awa
<a href="#">CNTR-000000000000008</a>	HHS IT Ops & Maint Svcs	HHSN847351200567W	10	Awarded	Time & Materials	11,853,225.32	05/27/2017
<a href="#">CNTR-000000000000009</a>	Karen Contract		10	Awarded	Cost (No Fee) Contract	1,000,000.00	05/27/2017

Close

# Manage Opportunities Overview

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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\*  Record Status\* **Active**

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

Debrief Document  Result

Debrief Officer

Debrief Date  Loss Reason

Debrief Attendees  Loss Comments

Lessons Learned

**F** Click this link to open the Subcontracts subtask.

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

# Manage Opportunities Overview

## Manage Opportunities

### Identification

Opportunity ID

Record Type

Exclude from Reports

Name \*

Record Status \*

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

Debrief Document

Result

Debrief Officer

Debrief Date

Loss Reason

Debrief Attendees

Loss Comments

Lessons Learned

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.

G

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

### Manage Opportunities > Subcontracts

	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

1

Enter opportunity identification data

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Accomplish the tabs

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Accomplish the Team Tab subtasks

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# Manage Opportunities Overview

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Enter opportunity identification data

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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

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 Result

Debrief Officer

Debrief Date Loss Reason

Debrief Attendees Loss Comments

Lessons Learned

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

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

# Manage Opportunities Overview



Deltek Costpoint

Identification

Opportunity ID:  Record Type:   Exclude from Reports

Name\*:  Record Status\*:

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

Debrief Document:  Result:

Debrief Officer:

Debrief Date:

Debrief Attendees:

Loss Reason:

Loss Comments:

Lessons Learned:

**1** 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**

OCI ID	OCI Name	Prime Contract No	Master Contract No	OCI Clear Date	Clear Date Review Status	Unequal Access	Biased	Im
<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

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Enter opportunity identification data

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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

Identification

Opportunity ID  Record Type   Exclude from Reports

Name\*  Record Status\*

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

Debrief Document  Result

Debrief Officer

Debrief Date  Loss Reason

Debrief Attendees  Loss Comments

Lessons Learned

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

J  
Click this link to open the Projects Linked subtask.

# Manage Opportunities Overview

1 Enter opportunity identification data

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General Status Details/Addresses RFP Info Team Cost 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

Expand All Collapse All

<input checked="" type="checkbox"/>	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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The screenshot shows the 'Manage Opportunities' web application interface. At the top, there is a navigation bar with menu items: FILE, LINE, OPTIONS, PROCESS, HELP. Below this is a toolbar with buttons for Save, Save & Continue, Refresh, Clone, Lookup, Default Action, Actions/Reports, Execute, Page Setup, Print Options, and Preview. The breadcrumb trail reads: Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities. The main content area is titled 'Manage Opportunities' and includes a toolbar with 'New', 'Copy', 'Delete', and navigation arrows. Below this is the 'Identification' section with fields for Opportunity ID, Name, Record Type (Manual), Record Status (Active), and an 'Exclude from Reports' checkbox. A tabbed interface is shown with tabs for General, Status, Details/Addresses, RFP Info, Team, and Post-Award Debrief. The 'Post-Award Debrief' tab is active and contains fields for Debrief Document, Debrief Officer, Debrief Date, Debrief Attendees, Lessons Learned, Result, Loss Reason, and Loss Comments. At the bottom, there is a navigation bar with links: User-Defined Info, Contracts, Subcontracts, Organizational Conflict of Interest (OCI) Records, Projects Linked, Activities, Documents, Project Initialization, and GovWin IQ. The 'Activities' link is highlighted with a red box and a circled 'L' callout.

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 \* Record Status \* Active

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

Debrief Document Result

Debrief Officer

Debrief Date Loss Reason

Debrief Attendees Loss Comments

Lessons Learned

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

Click this link to open the Activities subtask.

# Manage Opportunities Overview

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Deltek Costpoint

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

Manage Opportunities > Activities

New Copy Delete 1 of 1 New Table Query

**Activity**

Activity ID  **M** Enter relevant information on this subtask.

Subject

Location

Method

Activity Date

**Primary Contacts**

Activity Owner

Customer

Primary Contact

Business #

Other Attendees

Completed

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

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Delttek Costpoint >

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

→ **Manage Opportunities > Activities** New Copy ▼ Delete ◀◀ 1 of 1 New ↻ ▶▶ Table Query ▼ ☐ ☰ - X

**Activity**

Activity ID

Subject

Location

Method

Activity Date  

Completed N

**Primary Contacts**

Activity Owner

Customer

Primary Contact

Business #

Other Attendees

Activity Notes

Close

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.

# Manage Opportunities Overview

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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\*  Record Status\* **Active**

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

Debrief Document  Result

Debrief Officer

Debrief Date  Loss Reason

Debrief Attendees  Loss Comments

Lessons Learned

Click this link to open the Documents subtask.

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

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**Manage Opportunities** New Copy Delete 1 of 1 Existing Table Query

**Identification**

Opportunity ID:  Record Type:   Exclude from Reports

Name\*:  Record Status\*:

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

Debrief Document:  Result:

Debrief Officer:

Debrief Date:  Loss Reason:

Debrief Attendees:  Loss Comments:

Lessons Learned:

[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

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

P

# Manage Opportunities Overview

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Accomplish the tabs

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Accomplish the main screen subtasks

**Manage Opportunities** New Copy Delete 1 of 1 Existing Table Query

**Identification**

Opportunity ID:  Record Type:   Exclude from Reports

Name\*:  Record Status\*:

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

Debrief Document:  Result:

Debrief Officer:

Debrief Date:  Loss Reason:

Debrief Attendees:  Loss Comments:

Lessons Learned:

[Conflict of Interest \(OCI\) Records](#) [Projects Linked](#) [Activities](#) [Documents](#) [Project Initialization](#) [GovWin IQ](#)

**Manage Opportunities > Documents** New Copy Delete Query

Document ID *	Date Received	Document Type	File Location	File Name
<input type="text"/>				

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

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Identification

Opportunity ID: OPP-000000000000001  
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: [Progress bar]  
Loss Comments: [Text area]

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

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.

View Document

Close

# Manage Opportunities Overview

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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

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 Result

Debrief Officer

Debrief Date Loss Reason

Debrief Attendees Loss Comments

Lessons Learned

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

Click this link to open the Project Initialization subtask.



# Manage Opportunities Overview

1 Enter opportunity identification data

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The screenshot shows the 'Manage Opportunities' web application interface. At the top, there is a navigation bar with menu items: FILE, LINE, OPTIONS, PROCESS, HELP. Below this is a toolbar with buttons for Save, Save & Continue, Refresh, Clone, Lookup, Default Action, Actions/Reports, Execute, Page Setup, Print Options, and Preview. The breadcrumb trail reads: Browse Applications > Contracts > Opportunities > Opportunities > Manage Opportunities. The main content area is titled 'Manage Opportunities' and includes a toolbar with 'New', 'Copy', 'Delete', and navigation arrows. Below this is the 'Identification' section with fields for Opportunity ID, Name, Record Type (Manual), Record Status (Active), and an 'Exclude from Reports' checkbox. A tabbed interface is shown with tabs for General, Status, Details/Addresses, RFP Info, Team, and Post-Award Debrief. The 'Post-Award Debrief' tab is active, showing fields for Debrief Document, Debrief Officer, Debrief Date, Debrief Attendees, Result, Loss Reason, Loss Comments, and Lessons Learned. At the bottom, there is a navigation bar with links: User-Defined Info, Contracts, Subcontracts, Organizational Conflict of Interest (OCI) Records, Projects Linked, Activities, Documents, Project Initialization, and GovWin IQ. A callout box with a 'U' icon points to the GovWin IQ link, containing the text: 'Click this link to open the GovWin IQ subtask.'

# Manage Opportunities Overview

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Enter opportunity identification data

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Accomplish the main screen subtasks

Identification

Opportunity ID MTCL0

Name 2011 VA

Record Type GovWin IQ

Refresh from IQ

Do Not Refresh

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.

General

Last GovWin IQ Synch 03/

Program Name 2011

Acronym VAi2

GovWin IQ Analyst Update 10/26/2012

GovWin IQ ID OPP68185

Department VETERANS AFFAIRS

Agency OFFICE OF INFORMATION AND TECHNOLOGY

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 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

1

Enter opportunity identification data

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Accomplish the main screen subtasks

Current Status

Awarded

Details

Solicitation Number	VA11811RP0168	IQ Opportunity Link	<a href="http://www.fbo.gov">http://www.fbo.gov</a>
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	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		

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**

This concludes the Manage Opportunities Overview click-thru.