B2GNOW Software for Government

Staff User Manual

Chapter 1 – System Overview

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Chapter 1 – System Overview

Understanding user types

There are three types of users: Diversity Users, Project Managers/Buyers, and Vendor Users. Diversity Users and Project Managers/Buyers are both for staff, but the Project Manager/Buyer account is designed for strictly view-only access to records. The accessible records and transactions depend on your account type.

A **Diversity User** can:

- Add vendors and edit vendor information.
- Access and edit contracts, concessions, certifications, and audit information.
- Create new contracts, concessions, insurance certificates, and outreach projects.

A **Project Manager/Buyer** can:

- View contract records and audit information.
- Add vendors and edit vendor information.

A **Vendor** user can:

- Update their contact information.
- Provide subcontractor payment data for contract audits.
- Provide revenue and payment data for concession audits.

Understanding notification types

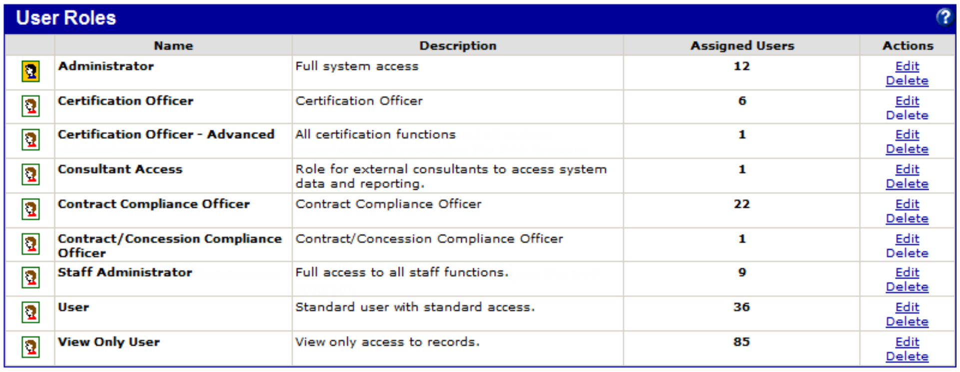
The system automatically generates several types of user notifications:

- Username/password reminder, password change, and account registration notices.
- Contract/concession/insurance audit notices.
- Unresponsive subcontractor/supplier/subtenant notices.
- Audit discrepancy notices.
- Outreach notices.

Some notifications may require a response, which are typically received by B2Gnow Support. There may be times when B2Gnow cannot address the issue. In these circumstances, B2Gnow forwards the message to a member of your staff, usually the Compliance Officer or Certification Officer. Please take the appropriate actions to resolve any user issues.

Understanding user roles for diversity users

The description for the user's accessibility defines the user roles. B2Gnow configures the roles with specific access rights to match the functions of your staff.



User Roles

	Name	Description	Assigned Users	Actions
	Administrator	Full system access	12	Edit Delete
	Certification Officer	Certification Officer	6	Edit Delete
	Certification Officer - Advanced	All certification functions	1	Edit Delete
	Consultant Access	Role for external consultants to access system data and reporting.	1	Edit Delete
	Contract Compliance Officer	Contract Compliance Officer	22	Edit Delete
	Contract/Concession Compliance Officer	Contract/Concession Compliance Officer	1	Edit Delete
	Staff Administrator	Full access to all staff functions.	9	Edit Delete
	User	Standard user with standard access.	36	Edit Delete
	View Only User	View only access to records.	85	Edit Delete

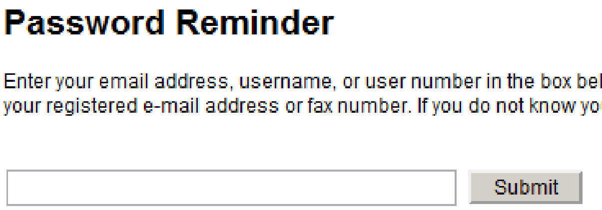
Getting started

To access the system, you require a user name and password. B2Gnow may have created an account for you during implementation, or you can contact B2Gnow Support to have a new account configured.

NOTE: Your organization may require a procedure to be followed to approve your request for access. Please ask your supervisor or department director for more information.

To retrieve your log in information from the system home page

1. In the **System Access Login** box, click **Forgot Password**.
2. Enter your email address, user name, or user number.



3. Click **Submit**.

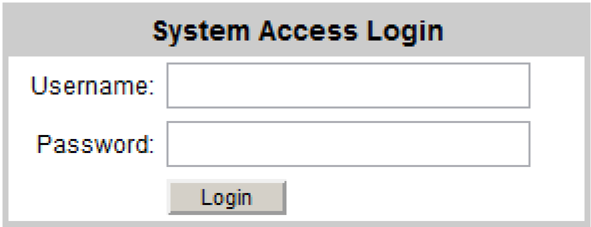
An email and/or fax user name/password reminder will be sent to you within minutes. In most cases, your user name is your email address.

Logging in for the first time

Once you receive your user name and password you are ready to get started.

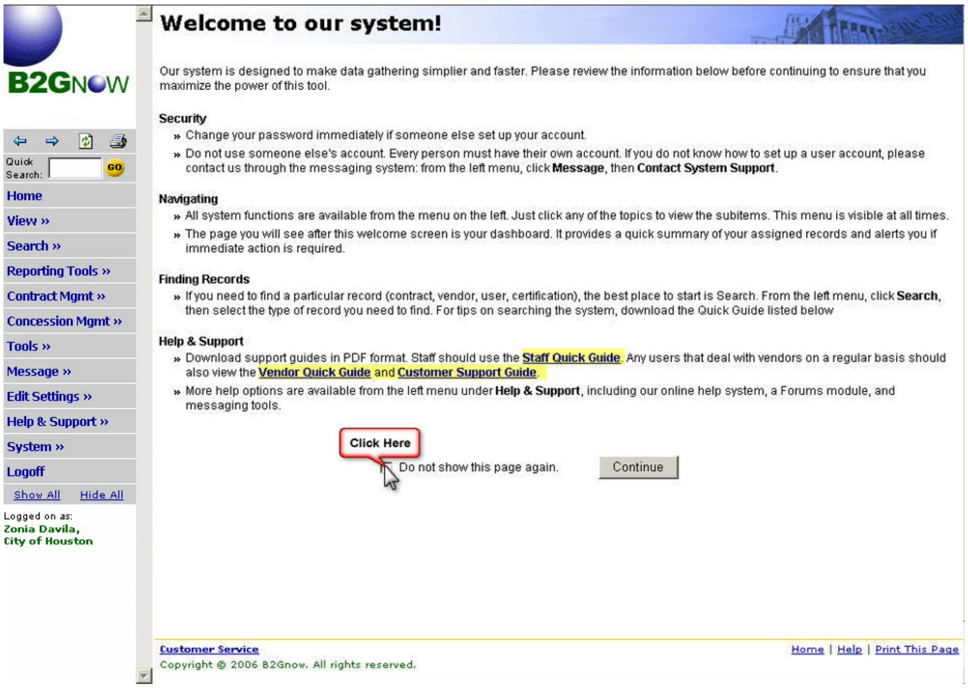
To log in

1. In the **Username** and **Password** fields, enter your user name and password.



2. Click **Login**.

The Welcome page displays introductory information for your benefit.

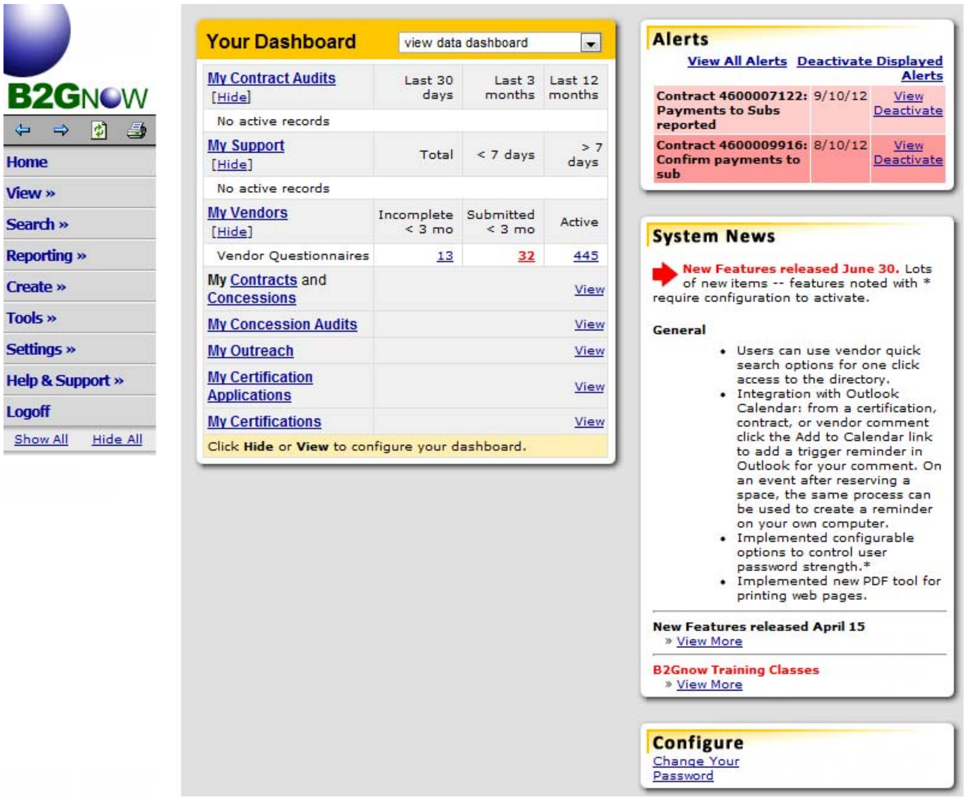


Review the information on this page. There are several useful PDFs available for download from the Help & Support area. You can download the Staff Quick Guide**,** the Vendor Quick Guide**,** and the Customer Support Guide. You can use these guides as a quick reference to the system.

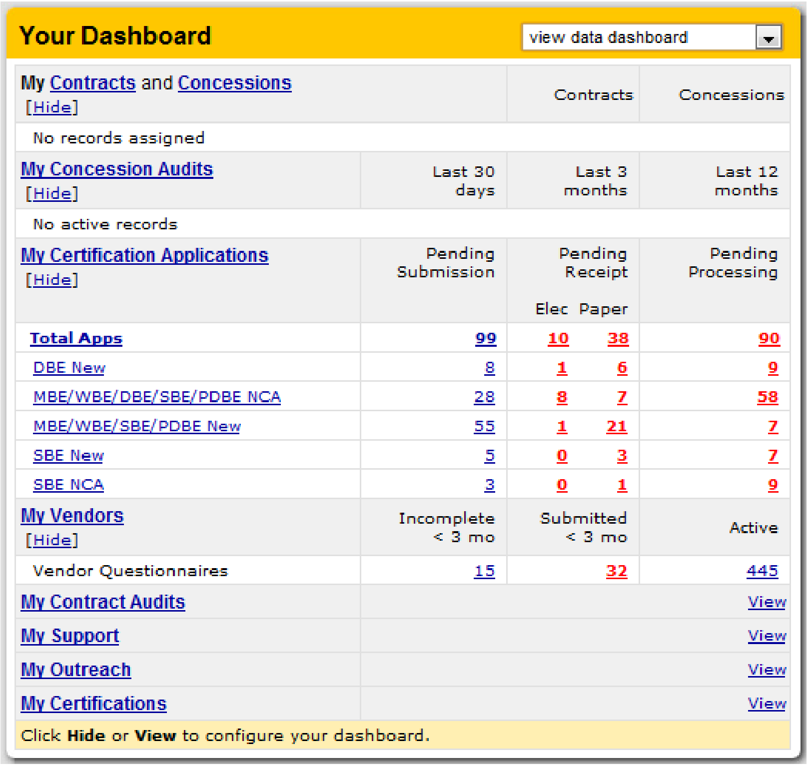
Click the checkbox to not display the page on future logins.

Viewing the Home page & Dashboard

After clicking Continue on the Welcome page, the system home page displays. From this page, you can access every feature your user role permits.



Using the Dashboard



Your Dashboard — view data dashboard

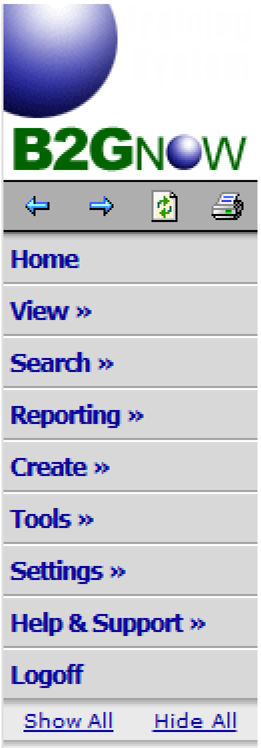
My Contracts and Concessions [Hide]		Contracts		Concessions
No records assigned				
My Concession Audits [Hide]	Last 30 days	Last 3 months		Last 12 months
No active records				
My Certification Applications [Hide]	Pending Submission	Pending Receipt		Pending Processing
		Elec	Paper	
Total Apps	99	10	38	90
DBE New	8	1	6	9
MBE/WBE/DBE/SBE/PDBE NCA	28	8	7	58
MBE/WBE/SBE/PDBE New	55	1	21	7
SBE New	5	0	3	7
SBE NCA	3	0	1	9
My Vendors [Hide]	Incomplete < 3 mo	Submitted < 3 mo		Active
Vendor Questionnaires	15	32		445
My Contract Audits				View
My Support				View
My Outreach				View
My Certifications				View

Click **Hide** or **View** to configure your dashboard.

The Dashboard provides a snapshot of your records and transactions. Items in red indicate the need for immediate attention. To view a list of issues, click the red number.

To configure your dashboard, click Hide or View. Your configuration automatically saves each time you view the Dashboard.

Exploring the navigation menu



The left navigation menu provides access to all functions in the system. Click the main categories to open additional sub-items. Click sub-items to access the selected function in the right display window.

NOTE: When new functions are added to the system, the menu may be extended or rearranged.

Performing searches

Using various search options and methods, you can search for specific information in the system.

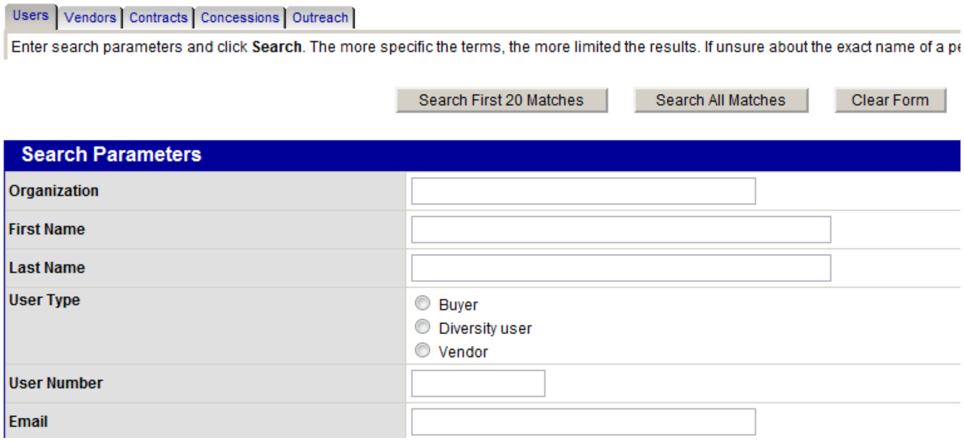
Searching for basic information

To search for information

1. From the **Search** menu, select a search option.
2. In the **Search Parameters** area, enter the search criteria.
3. Click **Search First 20 Matches** for a quick set of results or **Search All Matches** for a full set.

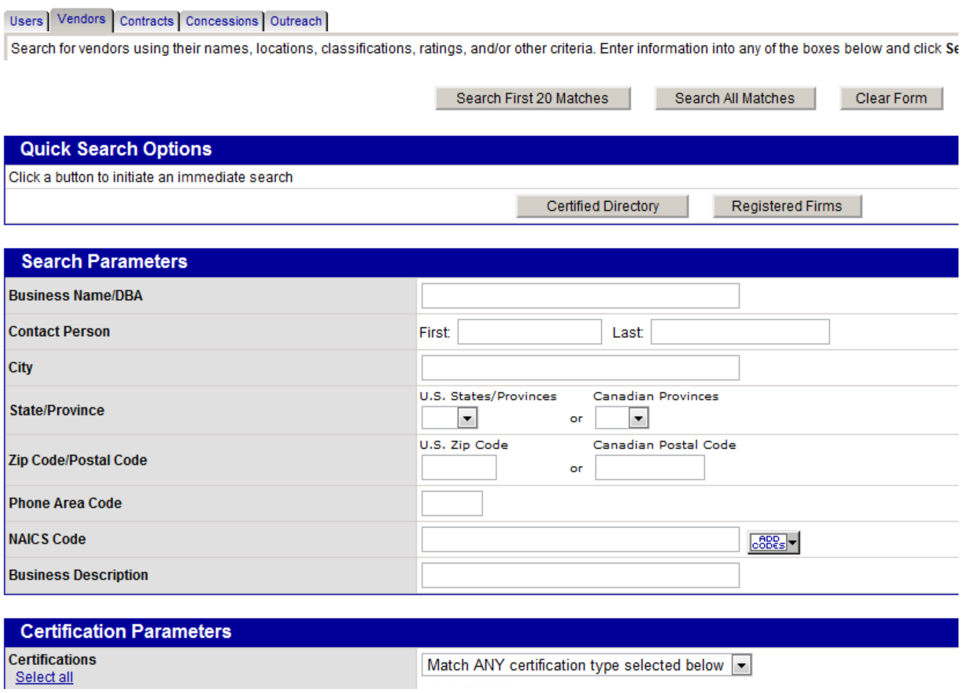
Understanding search types

User Search – Search for specific individuals in the system. You can search the entire system to find a vendor contact, project manager/buyer, or diversity user. You can search by company or organization, name, email address, or phone number.

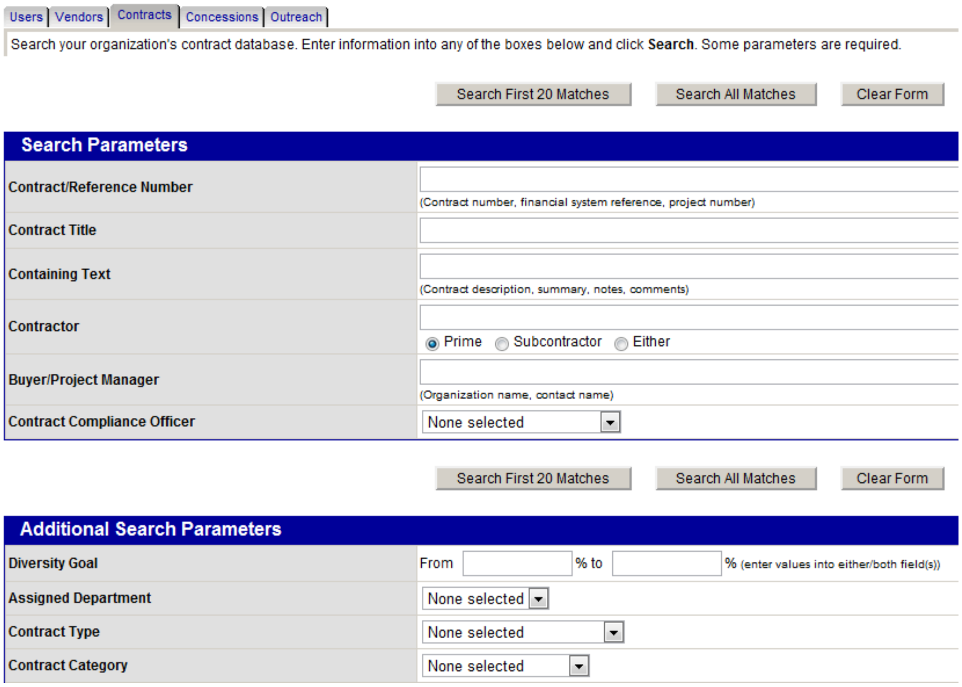


Vendor Search – Search for a specific vendor in the system. You can complete a simple search by name or an expanded search for vendors with specific certifications and commodity codes.

If your organization uses the system to certify vendors or has access to a certified directory, you can use certification details in the search.



Contract/Concession/Outreach Project/Insurance Search – Search for a reference number or title associated with a record. You can use advanced search parameters to locate the record.



Tips for performing searches

You can search for information based on the parameters that you set. To create a search string, keep the following tips in mind:

- **Start with one parameter**. Usually you can find the record you are looking for by using one or two parameters. The more specific your search terms, the less likely you are to find the record because of spelling, order, or other variations in your search.
- **Keep search parameters short**. Use "ACME" instead of "ACME Construction, Inc**.**" You can even use partial words, such as "envi" instead of "environmental consultant."
- **The system ignores punctuation**. C. C. is the same as C C; C & C is treated the same as C and C.
- **Become familiar with possible settings and options**. A record may not display because you selected the wrong option. Narrow the search parameters to prevent returning too many items in your search results.
- When searching for businesses named for their founder, such as John Smith & Co., the record may be listed under "John Smith and Co." or "Smith, John and Co." You may need to search for both versions. Start by searching for one of the names, such as Smith.
- **Searches are not case sensitive**. ACME is treated the same as acme.

- When searching by first name, be aware that users may be listed by alternate names. For example: James, Jim, Jimmy, or J.
- **When searching by contract or project number, you must enter the number in the exact order**. However, it does not have to be complete (for example, enter C53 to view all contracts that have C53 in the contract number, such as C531, C532, C53B, or C53980). If you enter the sequence out of order, you will not find the record you are looking for (C53 will not find C35).

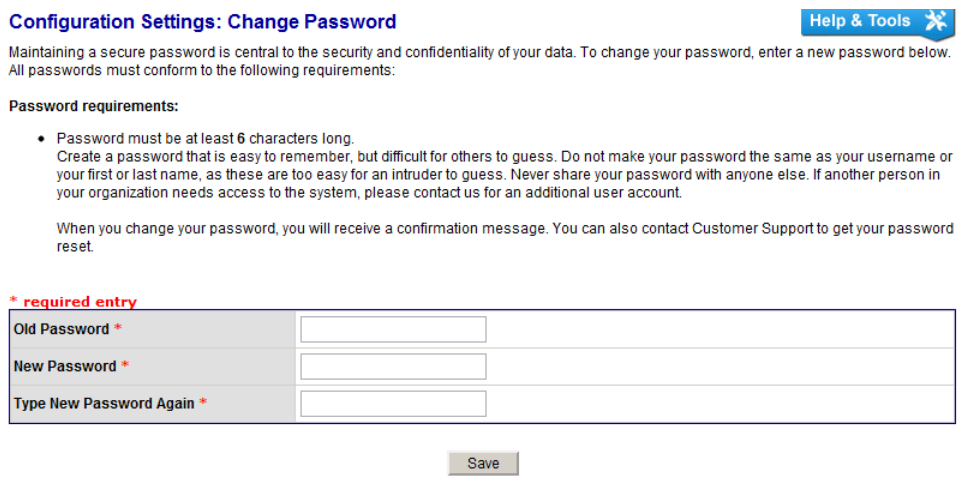
Configuring your settings

Changing your password

The first time you log in to the system, you may be required to change your password.

To change your password

1. From the **Settings** menu, click **Change Password**.
2. In the **Old Password** field, enter your old password.
3. In the **New Password** and **Type New Password Again** fields, enter your new password.



4. Click **Save**.

Your new password is effective immediately. You may also receive an email confirmation of the change.

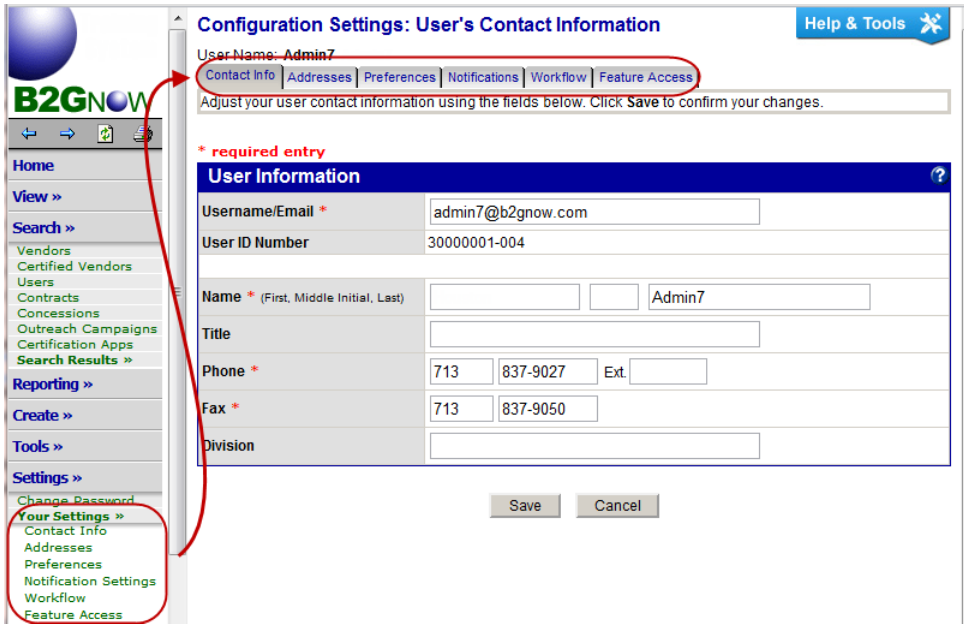
Editing your settings

Depending upon your access permissions, you may be able to update your account settings.

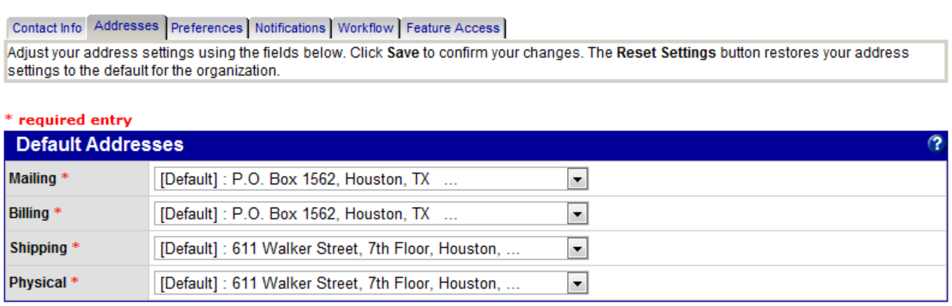
To update your account settings

1. From the **Settings** menu, open the **Your Settings** sub-menu.
2. Select the settings area you want to update.
3. Edit the fields as needed.
4. Click **Save**.

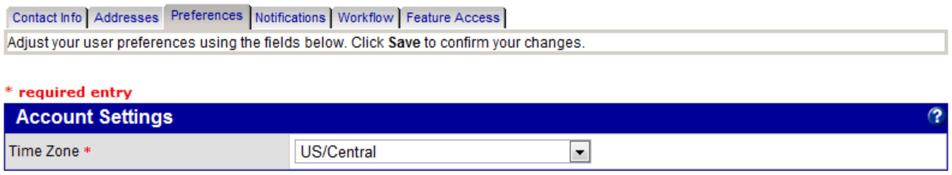
In the following example, User Information settings are displayed. You can open options by clicking the settings area in the navigation menu or by clicking the tab.



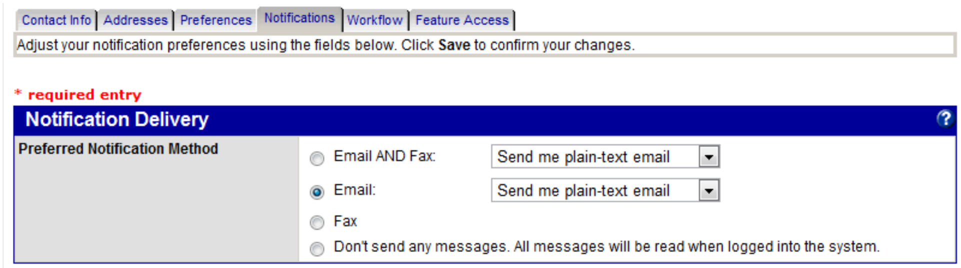
On the **Addresses** tab, you specify the address(es) you want to use for your mailing address, which is where your mail is delivered; your billing address, which is the address you use for billing information; your shipping address, which is where any packages are delivered; and your physical address, which is the physical location of your office. They may be the same. Contact B2Gnow Support if you need to add an address to the list.



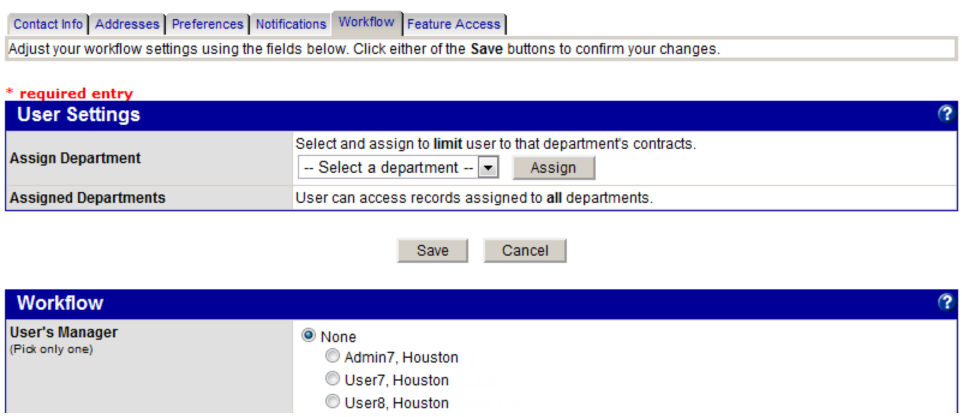
On the **Preferences** tab, you can set the time zone for your location and specify your preferred language.



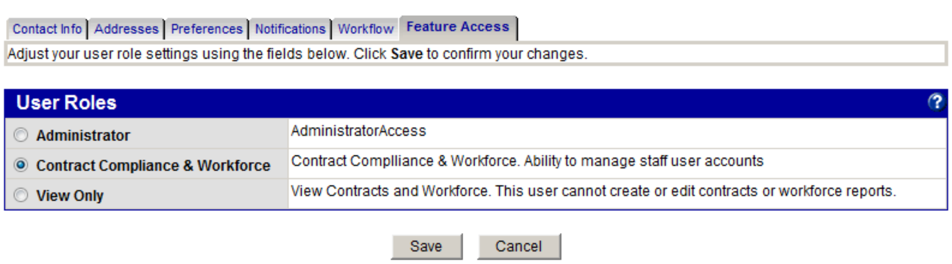
On the **Notifications** tab, you specify the way in which you want to receive notifications from the system.



On the **Workflow** tab, you set assigned department and user hierarchy. If a user is assigned to a specific department, they can only view contracts and related records from that department. Otherwise the user can view all records maintained by your organization.



On the **Feature Access** tab, view the user's role for accessing the system.



Sending messages

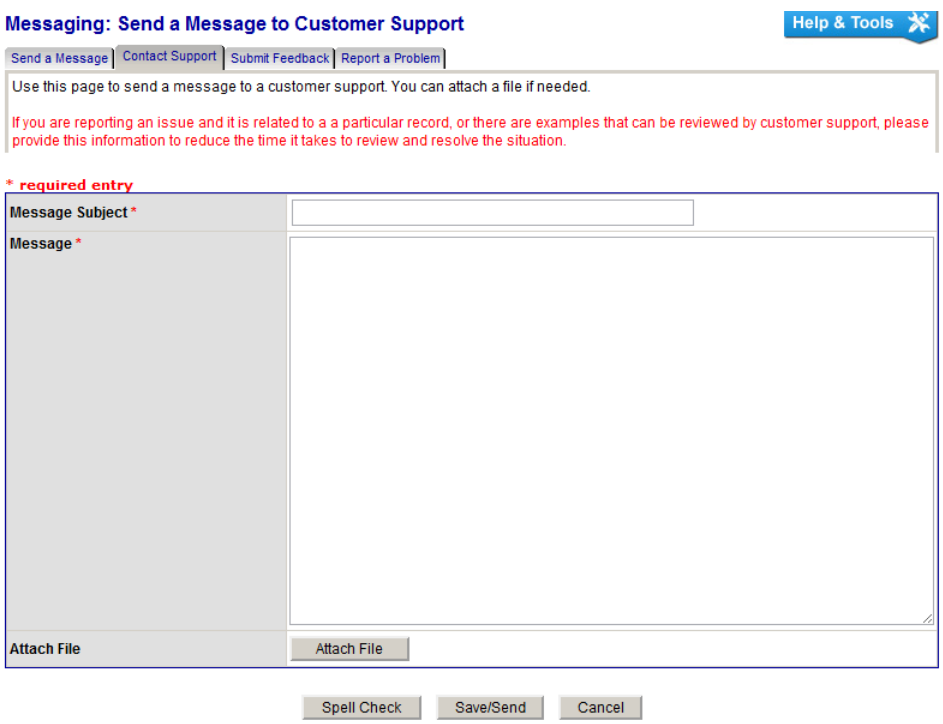
The system includes the ability to send email messages to other users. It is an easy way for Compliance or Certification Officers to contact vendors about an issue without having to use an external email program. Vendors also communicate with each other. The sent message is saved, providing a detailed transaction and audit history.

Contacting Support

If you need assistance, you can contact System Support.

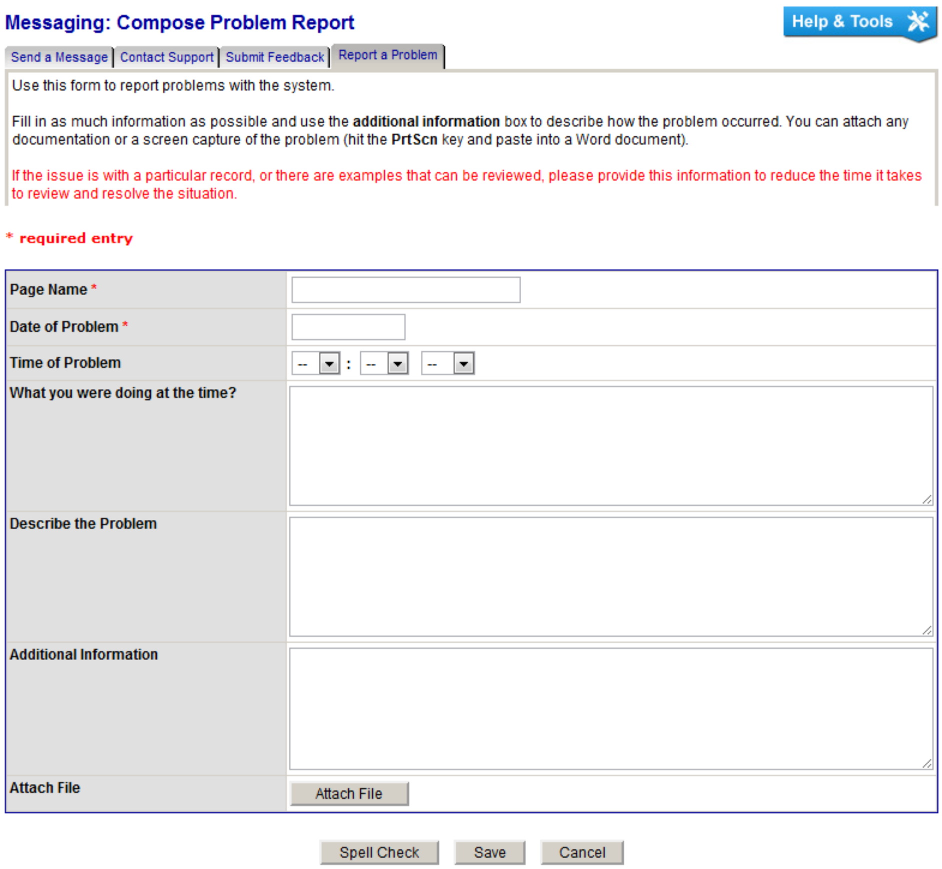
To contact support

1. Open the **Help & Support** menu, and then click **Contact Support**.
2. In the **Message Subject** field, enter a description of the issue for which you want to contact support.
3. In the **Message** field, enter the message.
4. Click **Save/Send**.



To report a problem

If you experience an unexpected issue with the system, please report the problem to customer support by clicking the Report a Problem tab. When reporting an issue, enter specific information. The more information you give to us about the problem, the faster we can address the issue. Tell us what you were doing and what links you clicked. When applicable, please attach a screenshot of the page.



Messaging: Compose Problem Report

Help & Tools

Send a Message | Contact Support | Submit Feedback | Report a Problem

Use this form to report problems with the system.

Fill in as much information as possible and use the **additional information** box to describe how the problem occurred. You can attach any documentation or a screen capture of the problem (hit the **PrtScn** key and paste into a Word document).

If the issue is with a particular record, or there are examples that can be reviewed, please provide this information to reduce the time it takes to review and resolve the situation.

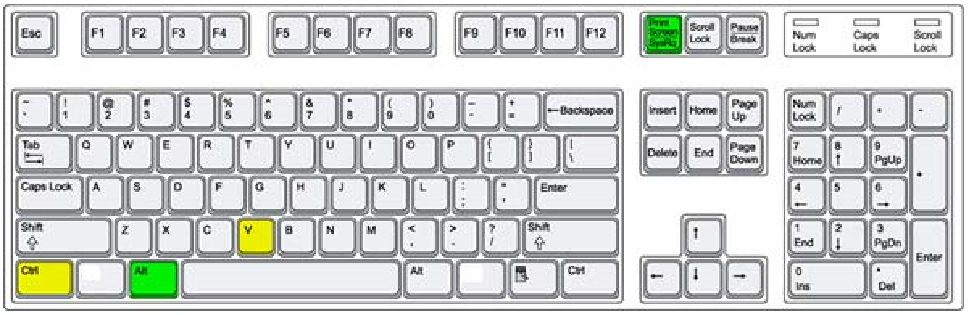
* required entry

Page Name *	
Date of Problem *	
Time of Problem	-- : -- --
What you were doing at the time?	
Describe the Problem	
Additional Information	
Attach File	Attach File

Spell Check | Save | Cancel

To capture a screenshot

1. Click the **Print to PDF** link at the bottom right of the page, or
2. Press and hold the **Alt** key, and then press the **Print Screen** key.



3. Release the keys.
4. In Microsoft Word, paste the image into a new document, and then save the document.

To attach a file

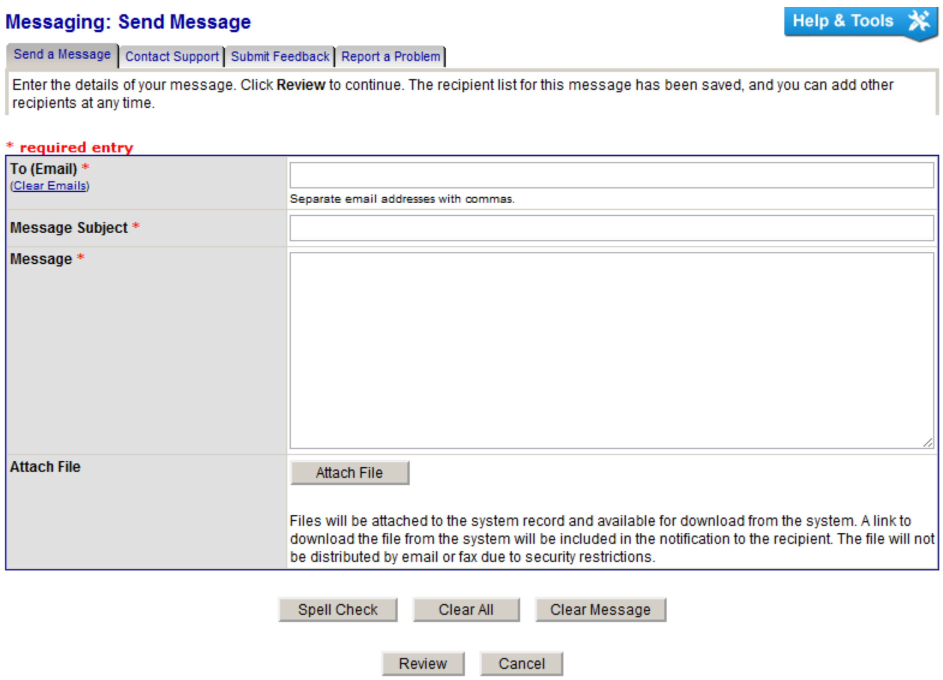
1. When composing your message, click **Attach File**.
2. Locate and open the file.
3. Click **Attach File**.

Sending messages to other users

You can send email or fax messages to other users, depending on their user settings. Users can also access messages and attachments after logging on to the system.

To send a message

1. Click the **Send a Message** tab.

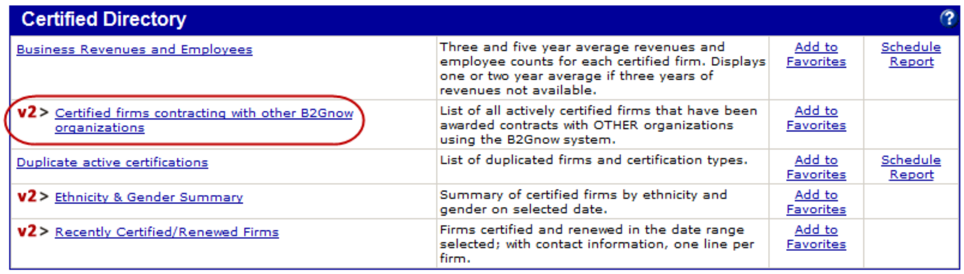


2. In the **To (Email)** field, enter the user's email address.
3. In the **Message Subject** field, enter the subject of the email message.
4. In the **Message** field, enter the message.
5. Click **Review** to verify your message.
6. Click **Send** to send your message.

You can also contact users from the search results page, on the contract audit summary page, and from a vendor profile.

Generating reports

The system has hundreds of standard reports and may include custom reports for your organization. A complete list of these reports displays on the Reporting Tools: Report List page. There are two types of reports, real time reports, specified with a v2 next to the report title, and data dump reports.



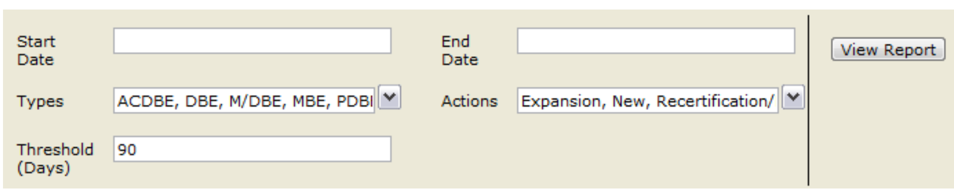
Certified Directory			
Business Revenues and Employees	Three and five year average revenues and employee counts for each certified firm. Displays one or two year average if three years of revenues not available.	Add to Favorites	Schedule Report
v2 > Certified firms contracting with other B2Gnow organizations	List of all actively certified firms that have been awarded contracts with OTHER organizations using the B2Gnow system.	Add to Favorites	
Duplicate active certifications	List of duplicated firms and certification types.	Add to Favorites	Schedule Report
v2 > Ethnicity & Gender Summary	Summary of certified firms by ethnicity and gender on selected date.	Add to Favorites	
v2 > Recently Certified/Renewed Firms	Firms certified and renewed in the date range selected; with contact information, one line per firm.	Add to Favorites	

Running reports

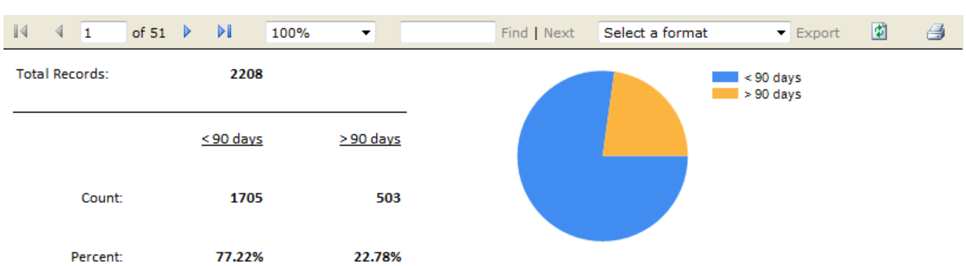
You can use the Reporting Tool to generate any of the reports available to you.

To run a real time report

1. Open the **Reporting** menu, and then click **Full List**.
2. Click the title of the real time report you want to run, which will have a v2 next to it.
3. Enter or select the options you want to use for the report. Options may differ between reports.



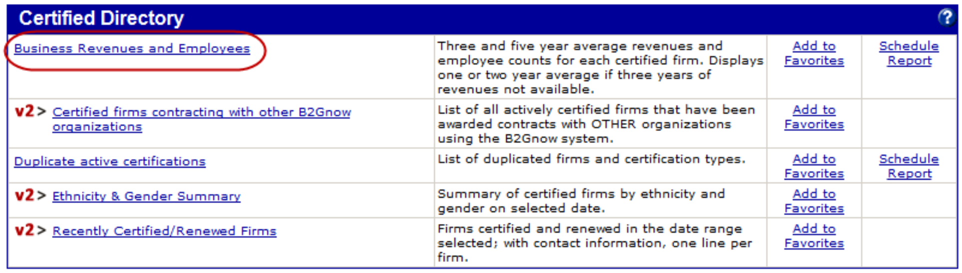
4. Click **View Report**.
   The report displays in the browser window.
5. You can navigate between pages, change the magnification, search for specific text, and print the report.



6. To export the report into another forma, such as PDF, Excel, CSV, Word, or TIF, select the format type from the **Select a format** list, and click **Export**.

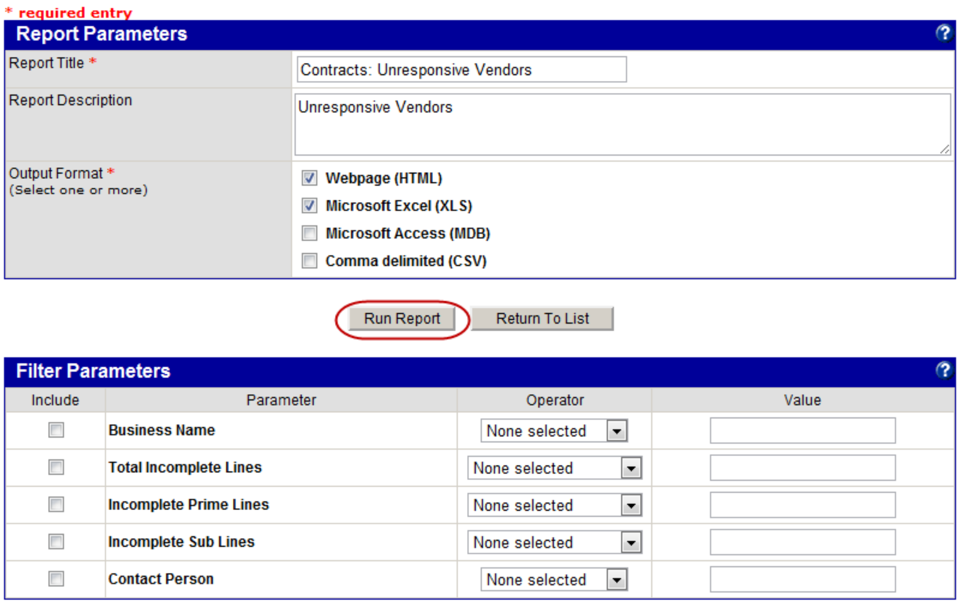
To run a data dump report

1. Open the **Reporting** menu, and then click **Full List**.
2. Click the title of the report you want to run, which will *not* have a v2 next to it.



Certified Directory			
Business Revenues and Employees	Three and five year average revenues and employee counts for each certified firm. Displays one or two year average if three years of revenues not available.	Add to Favorites	Schedule Report
v2 > Certified firms contracting with other B2Gnow organizations	List of all actively certified firms that have been awarded contracts with OTHER organizations using the B2Gnow system.	Add to Favorites	
Duplicate active certifications	List of duplicated firms and certification types.	Add to Favorites	Schedule Report
v2 > Ethnicity & Gender Summary	Summary of certified firms by ethnicity and gender on selected date.	Add to Favorites	
v2 > Recently Certified/Renewed Firms	Firms certified and renewed in the date range selected; with contact information, one line per firm.	Add to Favorites	

3. Select the parameters. Some reports require a date or date range, and all reports have different output formats. You must select the desired output format at this time.



* required entry

Report Parameters	
Report Title *	Contracts: Unresponsive Vendors
Report Description	Unresponsive Vendors
Output Format * (Select one or more)	Webpage (HTML) Microsoft Excel (XLS) Microsoft Access (MDB) Comma delimited (CSV)

Run Report | Return To List

Include	Parameter	Operator	Value
	Business Name	None selected	
	Total Incomplete Lines	None selected	
	Incomplete Prime Lines	None selected	
	Incomplete Sub Lines	None selected	
	Contact Person	None selected	

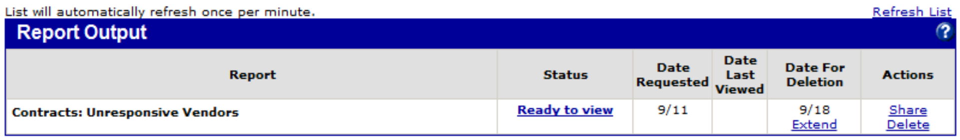
4. Click **Run Report**. It will be queued for processing and will usually complete within two minutes.

Viewing reports

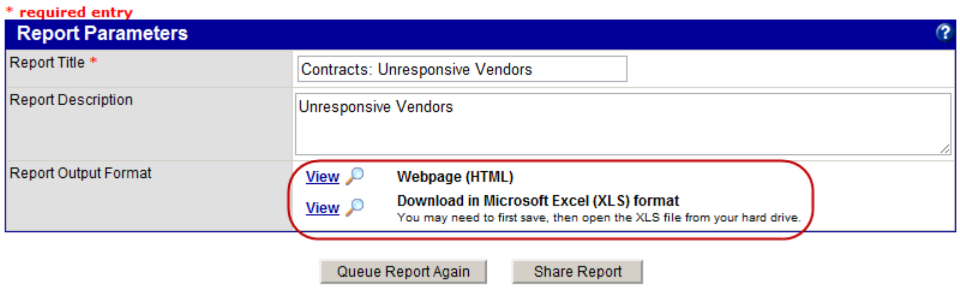
After running a data dump report, you can view it through the Report Output page. If the report is available to view, the status displays as "Ready to view." If the status is "pending," the report is not ready for viewing.

To view a report

1. Open the **Reporting** menu, and then click **View Report Output**.
2. Click the **Ready to view** hyperlink.



3. In the **Report Output Format** area, click the **View** hyperlink for the format in which you want to view the report.



There are several report output formats that are available. Not all formats are available on every report.

Webpage (HTML)

The report output displays as a Web page. Some reports may display multiple tables of data. Use this format to quickly view transaction and system information.

Adobe Acrobat (PDF)

The report output is formatted in a special report with tabularized and/or chart graphics. You can save and email the report.

Microsoft Excel (XLS)

The report output is downloaded and displayed as a Microsoft Excel spreadsheet. You may be prompted to open or save the file.

Comma delimited (CSV)

The report output is formatted in a manner that divides the data using commas. You can open the results in a viewer (such as Microsoft Excel) or save the results to a .csv file (which can be opened using Microsoft Excel).

Text (TXT)

The report output is formatted and output directly to a text file. You can open the report results in a text viewer, or you can save the results to a text file. Use this format to download data you can load into older database systems.

Custom Format

Some reports require specific output layouts, such as the FAA, FTA, and FHWA annual/semi-annual reports. The calculated data displays in a form for review and editing.