



# Vendor Guide

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## ***Summary of Questions***

### **System access**

- What is my username?
- What is my password?
- How do I login?
- How do I change my password?
- What do I do if I forget my password?
- How do I log out?
- What types of software are needed to access the system?
- Will using the system alter my computer in any way?

### **Account Configuration and Settings**

- How do I add another user?
- How do I edit my own account settings?
- How do I edit the settings of other users?
- How do I update my organization's information?

### **System Support**

- How do I access the online help system?
- How do I get help from customer/technical support?
- How do I report a problem with the system?
- How can I provide feedback/suggestions?
- How can I view the Forums/Knowledge Base?

### **Certification**

- How do I view my certifications?
- What if my certification is about to expire?
- How do I become a certified vendor?

### **Contracts**

- How do I find a specific contract?
- How do I view a list of my contracts?
- How do I view an audit?
- How do I add submit a response?
- How do I change the person receiving the audit notices?
- How do I contact my Contract Compliance Officer?

### **General**

- How do I send a message to another user?
- How do I run a report?
- Formats of report output
- How do I search for other users?

### **Security**

- Is the system secure?
- Is my data protected?
- Can others access my account?
- Can others access my data?

## System Access

### What is my username?

Your username is usually your email address. However, in certain circumstances, it might be your business name or other combination of data.

### What is my password?

Your password is initially assigned to you. You must change it to something only you know the first time you login.

### How do I login?

1. Open the system home page in your Internet browser.
2. In the **System Access Login** box, enter your username and password.
3. Click **Login**.

### How do I change my password?

1. From the **Edit** menu, click **Change Password**.
2. In the **Old Password** field, type your old password.
3. In the **New Password** and **Type New Password Again** fields, type your new password.
4. Click **Submit**.

Your new password is effective immediately.

### What do I do if I forget my password?

1. Open the system home page in your Internet browser.
2. In the **System Access Login** box, click the **Forgot Password** link.
3. Enter your email address, username, or user number (format: #####-###) in the field and click **Submit**.
4. An email and/or fax username/password reminder will be sent to you within minutes.

### How do I log out?

1. From the left menu, at the bottom, click **Log Off**.
2. Click **OK** in the pop-up alert.

### What types of software are needed to access the system?

All you need to access the system is a standard Internet browser. The latest versions of Microsoft Internet Explorer, Netscape Navigator, Opera, Firefox, and Mozilla are all sufficient. Internet Explorer works best.

### Will using the system alter my computer in any way?

No, the system will leave no trace on your computer other than standard Internet browser history and cache files. You can delete these files at any time using your browser's options/preferences menu option. The system does not use "cookies" or any other form of recorded file.

## ***Account Configuration and Settings***

### **How do I add another user?**

1. From the **Edit Settings** menu, point to **Business Settings**, and then click **User List**.  
The Users window of the Vendor Console appears.
2. Click **Add User**. The User Information window appears.
3. Complete the information in the **Contact Information** box:
  - In the **Name field**, type the user's first and last name.
  - In the **Email/Username field**, type the user's e-mail address. The user must have an e-mail address to access the system.
  - In the **Phone Number and Fax Number fields**, type the user's phone and fax numbers.
  - In the Choose password and Retype password fields, type the user's password, and then retype it. When the user logs on to the system, they will be prompted to change their password.
4. Complete the information in the Addresses box:
  - In the **Physical list**, select the user's physical address (where the user is located).
  - In the **Mailing list**, select the user's mailing address (where the user's mail is sent).
  - In the **Billing list**, select the user's billing address (where the user receives invoices and payments).
  - In the **Shipping list**, select the user's shipping address (where the user receives shipment).
5. Complete the information in the **Account Preferences** box:
  - In the **Time Zone list**, select the user's time zone.
  - In the **Preferred Language list**, select the user's preferred language.
  - In the **Preferred Notification Method box**, select the user's preferred method for receiving notifications from the system. If the user prefers e-mail, select the e-mail format.
  - (Optional) In the **Notification Options box**, select the types of notifications the user wants to receive.
6. Click **Save Changes**.

**Note:** While adding a user, do NOT click the **Back** button of your browser. If you do, you will have to start the process from the beginning.

### **How do I edit my own account settings?**

1. From the **Edit Settings** menu, point to **Your Setting**, and click the section you want to edit.
  - **Contact Info:** Name, email address, phone, fax.
  - **Addresses:** Addresses assigned.
  - **Preferences:** Time zone and language.
  - **Notification Settings:** Notification method (email/fax/none).
  - **Workflow:** Supervisor.
  - **Feature Access:** Assigned role.

### **How do I edit the settings of other users?**

1. From the **Edit Settings** menu, click **User List**.
2. Click the name of the user you would like to edit.
3. The first page will display contact information settings. Edit the settings and click **Save** or click on any of the tabs to edit. See the previous question for descriptions of each tab.

## ***System Support***

### **How do I access the online help system?**

1. On the menu, point to **Help**, and click **Help System**.
2. Click any of the blue question mark icons throughout the system.

### **How do I get help from customer/technical support?**

1. From the **Tools** menu, point to **Messaging**, and click **Contact System Support**.
2. Enter your message and click **Submit**.

### **How do I report a problem with the system?**

1. From the **Tools** menu, point to **Messaging**, and click **Report a Problem**.
2. Enter your problem in the provided fields and click **Submit**.

### **How can I provide feedback/suggestions?**

1. From the **Tools** menu, point to **Messaging**, and click **Submit Feedback**.
2. Enter your feedback and click **Submit**.

### **How can I view the Forums/Knowledge Base?**

#### **To access the Forums/Knowledge Base**

1. On the menu, point to **Help & Support**, and click **Forums/Knowledge Base**.
2. The main page of the Forums is displayed.
3. A list of active forums is displayed that includes the date/time of the last post and the number of topics and posts. A yellow arrow is displayed next to any forum that contains a post that you have not read.

#### **To view a forum**

1. To view a forum, click the title of the forum.
2. A list of the topics in the forum is displayed.
3. The list includes the topic starter (the user that posted the first message), the date/time of the last post, and the number of replies and views of the topic. A yellow arrow is displayed next to any topic that contains a post that you have not read.

## ***Certification***

### **How do I view my certifications?**

1. Click on **View** from the Left Module, click **My Certifications**.

### **What if my certification is about to expire?**

1. Contact your Contract Compliance Officer immediately. Certifications **cannot** be renewed from this system.

### **How do I become a certified vendor?**

1. Your certification application must be submitted to the certifying agency in writing or as instructed.

## **Contracts**

### **How do I find a specific contract?**

1. From the **Search** menu, click **Contracts**.
2. Enter the contract number in the first field, or fill in/select other parameters.
3. Click **Search**.

### **How do I view a list of my contracts?**

1. From the **Left Navigation Module** menu, click **View**, then click **My Contracts**.
2. All of the contracts that are assigned to you will be displayed.

### **How do I view an audit?**

1. From the contract search results, scroll down to see your Audit History.
2. Find the audit dates you want to view, click **View Audit** in the Action column.

### **How do I submit a response?**

1. From the **Audit View page**, click on **View Audit/Submit Response at the top of the page**.
2. Fill in your payment information, click **Review**.
3. Verify the data and answer the questions, click **Submit**.

**Note:** If you are responding to a final payment, don't forget to mark the payment as FINAL. If you do not do this, you will continue to receive Contract Compliance Notices even after your contract is completed. If this happens, mark the final payment as Zero. This will stop the notices.

### **How do I change the person receiving the audit notices?**

1. In the User Assignment box, Contact Person field, click the drop down menu and select another user.  
The contract will automatically be updated to send all notices for this contract to the new contact.
2. To add authorized users to the list for your business, see **Adding a user**.

### **How do I contact my contract compliance officer?**

1. Refer to "**How do I view an Audit?**"
2. In the **Contract Compliance Officer** box, click the name or email address of the contract compliance officer to send them a message.
3. Type in your message in the input field, click **Review**.
4. In the Review Page, click **Send**.

## General

### How do I send a message to another user?

1. From the **Message** menu, click **Send a Message**.
2. Enter your message and click **Review**.
3. When you are finished reviewing the message, click **Send**.
4. The recipient is notified by e-mail or fax that a message has been sent. The notification method depends on the recipient's settings. The message, and any attachments, can also be accessed after the recipient logs on to the system.

### How do I run a report?

The reporting tool works in two parts. First you select the report you want to run and enter any required and optional parameters. The system will then run the report for you, which can take a couple of seconds, or a few minutes, depending upon the amount of data used to generate the report. Second, when the report is ready for viewing, it will display on your Report Output list for you to view online or download.

#### To queue a report to run

1. On the menu, point to **Reporting Tools**, and click **Run/Queue Report**.
2. A list of recently run reports is displayed. To run one of these reports, click the title of the report.
3. To view the complete list of available reports, click **View Complete Reports List**.
4. If a Date Range field is display, enter the starting and ending dates for the report.
5. If the Filter Parameters box is present, select the desired optional parameters.
6. Click **Run Report**.
7. The report will be run

#### Viewing a report

1. On the menu, point to **Reporting Tools**, and click **View Report Output**.
2. Click the **Ready to View** link in the Status column for the report you want to view. If the Status indicates **Pending**, it is not ready for viewing.
3. Edit the report title and description as necessary.
4. Select the **Report Output Format**.
5. Click **View Report Output**.

### Formats of report output

There are several report output formats that can be used.

#### Webpage (HTML)

The report output will be displayed in a new Internet browser window as a web page. Some reports may display multiple tables of data. This format is best for quickly viewing transaction and system information.

#### Microsoft Excel (XLS)

The report output will be display in a new Internet browser as a Microsoft Excel spreadsheet.

**NOTE:** There is a known issue with Microsoft Excel 2000 that prevents a downloaded Excel file from being saved to your hard drive. This is usually due to the file being opened in your Internet browser. You may also be prompted for a username and password. If you have this version of Excel, it is suggested that you use the Comma delimited (CSV) format, as it ignores the Internet browser when opening the file and sends the file directly to Excel.



## Comma delimited (CSV)

The report output will be formatted in a manner that divides the data using commas. A **File Download** box will be displayed asking you to **Open** the report results in viewer (such as Microsoft Excel), or **Save** the results to a .csv file (which can be opened from your hard drive using Microsoft Excel).

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**TIP:** This is the best format if you wish to sort, filter, and edit the data for printing or distribution.

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## Raw text (TXT)

The report output will be formatted and output directly to a text file. A **File Download** box will be displayed asking you to **Open** the report results in a text viewer, or **Save** the results to a text file. This format is used for downloads of data that are to be loaded into older database systems.

## XML

The report output is converted to XML format in a new Internet browser window. This format is used for downloads of data that are to be loaded into newer database systems that are configured to interpret the XML output.

## How do I search for other users?

1. On the menu, point to **Search**, and then click **Users**.
2. Enter search parameters and click **Search**. The more parameters, the narrower the search.
3. The search results appear. If no matches were returned, you can modify the search by clicking **Search Again**.

## Tips to use in searches

Good search technique is critical to efficient use of the system.

- Start with **one** parameter. Usually one, a sometimes two parameters, is sufficient to find the record you are looking for. The more specific your search terms, the more likely the record will **not** match the terms due to spelling, order, or other variations.
- Keep the search parameters short. Use **ACME** instead of **ACME Construction, Inc.** You can even use partial words, such as **envi** instead of typing **environmental consultant**.
- The system will ignore punctuation. **C & C** is treated the same as **C and C**; **C. C.** is the same as **C C**.
- When searching for businesses that are named for their founder, such as **John Smith & Co.**, it may be listed as **John Smith and Co.** or **Smith, John and Co.** You may need to search for both versions. Start by searching just for one of the names, such as **Smith**.
- Become familiar with the possible settings and options. The record you are seeking may not be displayed because you have selected the wrong option. Or too many records were returned because you did not narrow the search parameters.
- The search is 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, where you are typing a specific reference, your number must be exactly correct. It does **not** have to be complete (type **C53** to view all contracts that have **C53** in the contract number, such as **C531, C532, C53B, C53980** etc.), but **C53** will not find **C35**.

## ***Security***

### **Is the system secure?**

The system is extremely secure. When you log in, you are assigned a unique, temporary identifier. The identifier will expire within four hours. Using the system will refresh the expiration of the identifier, so that you can continue your work. When you are finished, we recommend logging out before you close your Internet browser. This will delete the identifier, preventing someone from using your computer to gain access to your account.

### **Is my data protected?**

Your data is protected all of the time. It is stored on top-of-the-line servers that are protected by multiple hardware and software firewalls. Confidential data is protected by industrial-strength encryption.

### **Can others access my account?**

No other users can access your account. Your username and password are unique. **NEVER** give these to any one else. If someone in your organization requires access to the system, you can set up a new account for them.

### **Can others access my data?**

Other users in your organization can see the same information as you, depending upon their access settings.

## System Menu Options

When you log in to your account, the menu on the left provides quick access to all functions in the system. Click the main categories to reveal additional sub-items, and click those items to link to the selected function in the right display window. **Note: As new functions are added, the menu system is extended and sometimes rearranged for efficiency.**

	Go back     Go forward     Refresh the page     Print the page
<b>Quick Search:</b> <input type="text"/>	Enter a search term and click Go to search the contract, concession, outreach, vendor, and user databases. Because all data types are searched, this can sometimes take longer. Return to the main page of your account. You can also click the logo in the top left.
<b>Home View »</b> My Contracts My Contract Audits My Certifications My Concessions My Concession Audits My Outreach Projects Messages	A listing of your contracts. A listing of your contract audits. A listing of your certifications. A listing of your concessions. A listing of your concession audits. A listing of outreach available to you. A listing of the messages you've sent and received in the system.
<b>Search »</b> Vendors Certified Vendors Contracts Concessions Outreach Projects Users	Search the entire vendor database. Search the certified vendor directory. Search the contracts database. Search the concessions database. Search the outreach projects database. Search for a specific system user (staff or vendor).
<b>Message »</b> Send a Message Contact Support Submit Feedback Report a Problem	Write and send a message to any system user. Get help with using the system. Contact us with your thoughts and suggestions about the system. Report to us an issue that you're having with the system.
<b>Edit Settings »</b> Change Password Your Settings <b>Business Settings »</b> Business Info Vendor Profile User List Add a User Account Preferences Commodity Codes Subscription Services	Change your password. Update your user account settings. Update your business information. Update your vendor profile. View all authorized users in your business. Add a new user to your business. Update account preferences for your business. Update commodity codes. Manage value-added subscriptions.
<b>Help &amp; Support »</b> Help System Forums Vendor Quick Guide Vendor Training Manual Contact Support Submit Feedback Report a Problem	View the online help for the system. View the online forums/knowledge base. Download the Vendor Quick Guide in PDF format. Download the Vendor Training Manual in PDF format. Get help with using the system. Contact us with your thoughts and suggestions about the system. Report to us an issue that you're having with the system.
<b>System »</b> System Status Board Contact B2Gnow About B2Gnow	Check the status of the system, including listings of maintenance and upgrades. Contact our team. View information about the software that powers the system, including version information.
<b>Logoff</b> <a href="#">Show All</a> <a href="#">Hide All</a>	Log off from the system. Click to show or hide all of the menu options listed above