

Posting Solicitations

Reference Guide

Solicitation Homepage

Post Solicitation

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Role Access

Solicitation roles with the capability to post Solicitations:

- Solicitation Manager

Create Solicitation

Select the **Post Solicitation** button in the navigation bar to begin posting a Solicitation.

The user is navigated to the Post Solicitation page. The data captured is used when sending the applicable Notice to FBO. All mandatory fields are marked with an asterisk.

Solicitation

1. **Solicitation Number** – Enter the solicitation number generated by the CWS. The Solicitation Number must be unique and must consist of 13 alphanumeric characters. Validations are as follows:

	Position 1-6	Position 7-8	Position 9	Position 10-13
Represents	Issuing Office DoDAAC	Issuing Year	Solicitation Type	Sequence Number
Character Requirement	Alphanumeric	Numeric	Alpha	Alphanumeric (At least one position must be nonzero)
Solicitation Type RFP			Must be R	
Solicitation Type RFQ			Must be Q, T, or U*	
Solicitation Type IFB			Must be B	
Solicitation Type BAA			Must be S	
Solicitation Type CSO			Must be S	Position 10 must be C

* FAR 4.1603 Procedures prescribes a letter Q or U for use in the 9th position for Requests for Quotations. DFARS 204.1603(a)(3)(A)(3) prescribes use of T in the 9th position to identify automated requests for quotations by authorized legacy contract writing systems.

2. Select DoD or non-DoD from the **Solicitation Number** dropdown menu.
3. **Solicitation Type** – Select from the following options:
 - a. RFP: Request For Proposal
 - b. RFQ: Request For Quote
 - c. IFB: Invitation For Bid
 - d. BAA: Broad Agency Announcement
 - e. CSO: Commercial Solutions Opening

4. **Notice Type** – Select a type from the dropdown menu. For more information regarding Notice Types, see the Notice Type section of this guide.
5. **Response Date** – Enter a response date. This is the deadline for receipt of bids, proposals, or responses for the Solicitation.
6. **Response Date Time Zone** – Select a time zone from the dropdown menu.
7. **Set Aside Code** – If the Solicitation is set aside, select a value from the dropdown menu.
8. **Primary Contact Name** – A primary contact may be added/edited using the **Lookup** tool. Contacts may be searched using name or email; only Solicitation Managers that are active within the posting user’s DoDAAC may be selected. The Solicitation Manager posting the Solicitation may remove themselves as the primary contact and add themselves as a secondary contact.
9. **Secondary Contact Name** – A secondary contact may be added/edited using the **Lookup** tool. Contacts may be searched using name or email.
 - a. Multiple Solicitation Managers may be assigned to a Solicitation using the **Secondary Contact Name** field. Notifications for the solicitation will be sent to all assigned managers.
10. **Description** – Enter a description of the Solicitation. This field must not exceed 2000 characters or contain the following characters: < > & ” or ‘. See FAR Subpart 5.207(c) for the general format.

Solicitation Details

1. **Subject** – Enter the title of services, supplies, or project. Data entered in this field must not exceed 256 characters or contain the following characters: < > & “ or ‘.
2. **Draft Solicitation** – Select the checkbox if creating a draft Solicitation. The subject will be appended with the word “DRAFT”.
3. **Posting Date** – This field is auto-populated with the current date, which is used for auditing when the Solicitation was posted to the Solicitation portal and subsequently posted to Contract Opportunities.
4. **Archive Date** – Enter the desired archival date for the Solicitation. The date must not be in the past.
5. **Product or Service Code** – To enter a value, use the **Lookup** button to locate the required entry. Entries may be searched using code or description. If the Solicitation is for multiple goods and/or services, select the entry best describing the overall acquisition.
6. **NAICS** – To enter a value, use the **Lookup** button to locate the required entry. Entries may be searched using code or description. If the Solicitation is for multiple goods and/or services, select the entry best describing the overall acquisition.
7. **Place of Performance Zip Code** – Enter the zip code of the Place of Performance.
8. **Place of Performance Address** – Data entered in this field must not exceed 2000 characters or contain the following characters: < > & “ or ‘.
9. **Recovery Act** – The value will be defaulted to No. Select Yes if this is a Recovery and Reinvestment Act Action.

Restricted Access

1. **Restricted Solicitation** – Select an option from the dropdown menu.
 - a. **Restricted** – If a Solicitation is restricted, the Solicitation Manager must specify which CAGE codes are to have access to the Solicitation. Only vendors with the specified CAGE codes will be able to view the Solicitation.

Proposal Managers registered to CAGE codes without restricted access will be able to view the solicitation if they are registered for CAGE codes on the restricted list.

- i. Specify whether the Solicitation should be posted to Contract Opportunities.
 1. If posting to Contract Opportunities, select a value from the **Notice Type** dropdown menu.
 2. If not posting to Contract Opportunities, select a value from the **Justification for not posting to SAM** dropdown menu.
 - ii. To specify the CAGE codes that will have access to the Solicitation, select one of the following options:
 1. **Allowed CAGE Codes** – To enter CAGE Code(s) to be granted access to the Solicitation individually, enter the codes in the provided fields. Multiple CAGE codes are permitted.
 - a. **Proposal Manager Emails** – Select the **Edit** button to open a modal in which the user may select or deselect contacts for the given CAGE to receive notifications for the Solicitation. A free text field is also available for adding a contact that is not populated in the Proposal Manager list. There is no limit to the number of email addresses a Solicitation Manager can enter per CAGE.

To apply the selection(s) to the Allowed CAGE Codes list, select the **Confirm** button.
Note: To save the selected contacts to the Solicitation, the Solicitation must be saved or posted (**Save Solicitation** or **Post Solicitation** buttons).
 - b. **Action** – To delete a CAGE code from the list, select the **Delete** button in the Actions column.
 2. **Add CAGE Code** – Select this button to add additional CAGE codes to the restricted list.
 3. **CAGE Code Bulk Upload** – Select this button to add multiple CAGE codes to the restricted list in a single action. Codes may be uploaded in an .xlsx file up to 2 GB in size. Select the **Choose File** button to upload the file from the local directory. A template is available under the Documentation menu in the navigation bar.
 - iii. Enter any comments in the **Additional Comments for Proposal Manager** field.
- b. **Non-Restricted** – If a Solicitation is non-restricted, it will be posted to Contract Opportunities.
- i. Select a value from the **Notice Type** dropdown menu.

Contract Information

1. **Contracting Office DoDAAC** – Select the DoDAAC that represents the Issuing Office of the Solicitation from the dropdown menu. This list is populated from the DoDAACs in the Solicitation Manager's profile.
2. The **Contracting Office Name** – This will be populated based on the DoDAAC selected in the previous field. These fields may be edited and must not contain the following characters: < > & “ or ‘.
3. **Contracting Office Address** – This will be populated based on the DoDAAC selected in the previous field. These fields may be edited and must not contain the following characters: < > & “ or ‘.

Offer Template

The Solicitation Manager may create a template consisting of volumes and attachment placeholders.

1. **Add Volume** – Select to add an Offer template.
2. **Volume Name** – Enter a name for the volume. Special characters are allowed, with the exception of: < > & “ or ‘.
3. **Volume Comments** – Add any necessary comments.

4. **Attachment Placeholders** – To add a placeholder, enter data in the **Attachment Name**, **Mandatory**, and **Attachment Comments** fields. Special characters are permitted in the Attachment Comments field, with the exception of < > & “ or ‘. Placeholders may be deleted using the delete icon in the Actions column.
5. Volumes may be deleted using the **Delete Volume** button.


Attachments

At least one attachment is required for a Solicitation. Attachments may be files or URLs; a Solicitation must only contain one attachment type.

- **Choose Files** – Select to locate and attach a file from the local directory. The combined total of all simultaneously uploaded files must not exceed 1.9 GB.
- **URL** – A URL may be added as an attachment. To add multiple URLs, use the **Add Attachment URL** button. URLs must include 'http://' or 'https://'.

Once the file or attachment URL has been added, the attachment will be displayed with user info, date and time stamp, CUI indicator, and restricted status. Attachments may be sorted, edited, or deleted using the icons in the Action column. (The **Save** button must be selected to confirm deletion of an attachment.)

Editing Attachments

To edit an attachment, select the **Edit** icon  in the Action column. The Attachment Information modal will display with the following fields:

1. **Attachment Name**: The file name may be edited.
2. **Attachment Number**: Attachments may be assigned a numerical value up to four digits.
3. **Document Type**: Attachments may be assigned a type of Attachment or Solicitation.
4. **Include in Response**: Attachments may be included or excluded by selecting Yes or No, respectively.
5. **Restricted Access**: Access to attachments may be restricted by CAGE Codes by selecting the **Add CAGE Code** link and entering the applicable codes one at a time. To remove a CAGE from the list, select the **Delete** button in the Action column next to the CAGE to be removed.

Controlled Unclassified Information (CUI)

*Note: The following applies to Government users only.

The presence of CUI in attachment files will be systematically detected and indicated in the Has CUI column upon upload. Prior to saving or posting the Solicitation, all attachments with CUI must be CAGE restricted and the checkbox within the Attachments section must be selected to confirm that no files contain classified information or unrestricted CUI.

I confirm that the files in this upload do NOT contain classified or unrestricted Controlled Unclassified Information (CUI). By checking this box, I am confirming that the files do not contain these types of data and I am aware my organization will be held accountable for non-complaint data sent through the system.

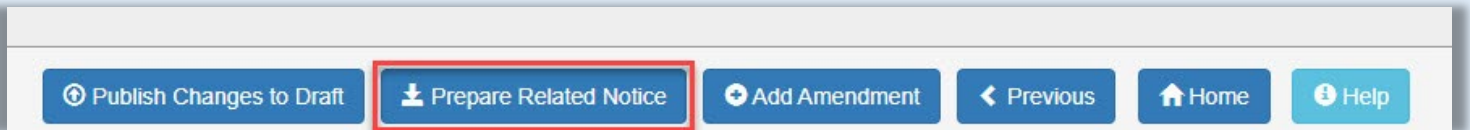
Notice Type

Solicitation Notice Types are as follows. When a particular notice type is selected during creation of a Solicitation, that is the notice that will be sent to SAM.

- **Solicitation**
 - The Solicitation will be final.
- **Combined Synopsis/Solicitation**
 - The Solicitation will be final.
- **Sources Sought**
 - The Proposal Manager will not have access to the Offer tab.
 - The notice needs to successfully relate to other notice types in SAM from different stages in the acquisition cycle as appropriate.
- **Draft**
- **Presolicitation**
 - The Proposal Manager will not have access to the Offer tab.
 - The notice needs to successfully relate to other notice types in SAM from different stages in the acquisition cycle as appropriate.

Sources Sought / Draft / Presolicitation Workflow

Solicitations with non-final Notice Types of Sources Sought, Draft, or Presolicitation will have the option to create a Related Notice that will be linked to the original Solicitation. After being posted, these Solicitation types will display a **Prepare Related Notice** button at the bottom of the page.



When creating a Related Notice, the Notice Types available to the user will be those not previously selected in the workflow. Additional Related Notices may be created until the user creates a final Notice (Solicitation or Combined Synopsis/Solicitation). When the user opens a Solicitation with a Related Notice(s), only the last created Notice will be displayed.

Example:

Post Solicitation with Sources Sought Notice Type

- > Prepare Related Notice with Draft Notice Type
 - > Prepare Related Notice with Presolicitation Notice Type
 - > Prepare Related Notice with Solicitation Notice Type
 - > Solicitation is final – no further Related Notice may be created

Save/Post Solicitation

Save Solicitation – A Solicitation may be saved at any time prior to completion/posting by selecting the **Save Solicitation** button at the bottom of the Post Solicitation page.

Post Solicitation – When data entry for the Solicitation is completed, select the **Post Solicitation** button at the bottom of the Post Solicitation page. This will initiate the FBO integration to post the Solicitation to FBO and make the Solicitation available on the portal for vendor offers. Upon submission of a restricted solicitation, Proposal Managers registered for the CAGE(s) specified by the Solicitation Manager will be notified via email that the solicitation is available.

Resend to SAM

Resend to SAM – When an error occurs in sending a posted Solicitation to SAM for an issue that the posting Solicitation Manager may resolve, the reason for the error and associated instructions for resolving the error will be displayed at the top of the Solicitation page. Prior to the response date, the Solicitation Manager may reattempt to post the Solicitation to SAM by correcting the stated issue(s) and selecting the **Resend to SAM** button at the bottom of the Solicitation page.

Award Notice

When a final Solicitation (Notice Type of Solicitation or Combined Synopsis/Solicitation) is posted, the Solicitation Manager may add an Award to the Solicitation via the Award tab. This tab is visible only to the Solicitation Manager(s) until an Award Notice is posted. There is no limitation on the number of Award Notices that may be posted to a Solicitation.

Adding Award Notice

1. Navigate to the applicable Solicitation and select the **Award** tab.
2. Select the **+Add** button to display the Award data fields.
3. Complete all required fields.
4. Select the **Save Award** button to save the Award information to the Solicitation.
5. Saved Award Notices may be deleted prior to posting to Contract Opportunities by selecting the **Delete Award** button.
6. When a saved Award Notice(s) is ready to be posted to Contract Opportunities, select the **+Post Awards** button.

An attempt will be made to post/relate the Award Notice in the GPE (SAM Contract Opportunities) if an attempt was previously made to post the notice for the Solicitation (Solicitation or Combined Synopsis/Solicitation).

User Access

For a restricted Solicitation, Proposal Managers and Proposal View Only for the CAGE Codes identified will be able to view the Award tab.

Evaluation Committee Members assigned can view the Award tab.

Award Notices on non-restricted Solicitations will be viewable on the public Solicitation site.