Logo

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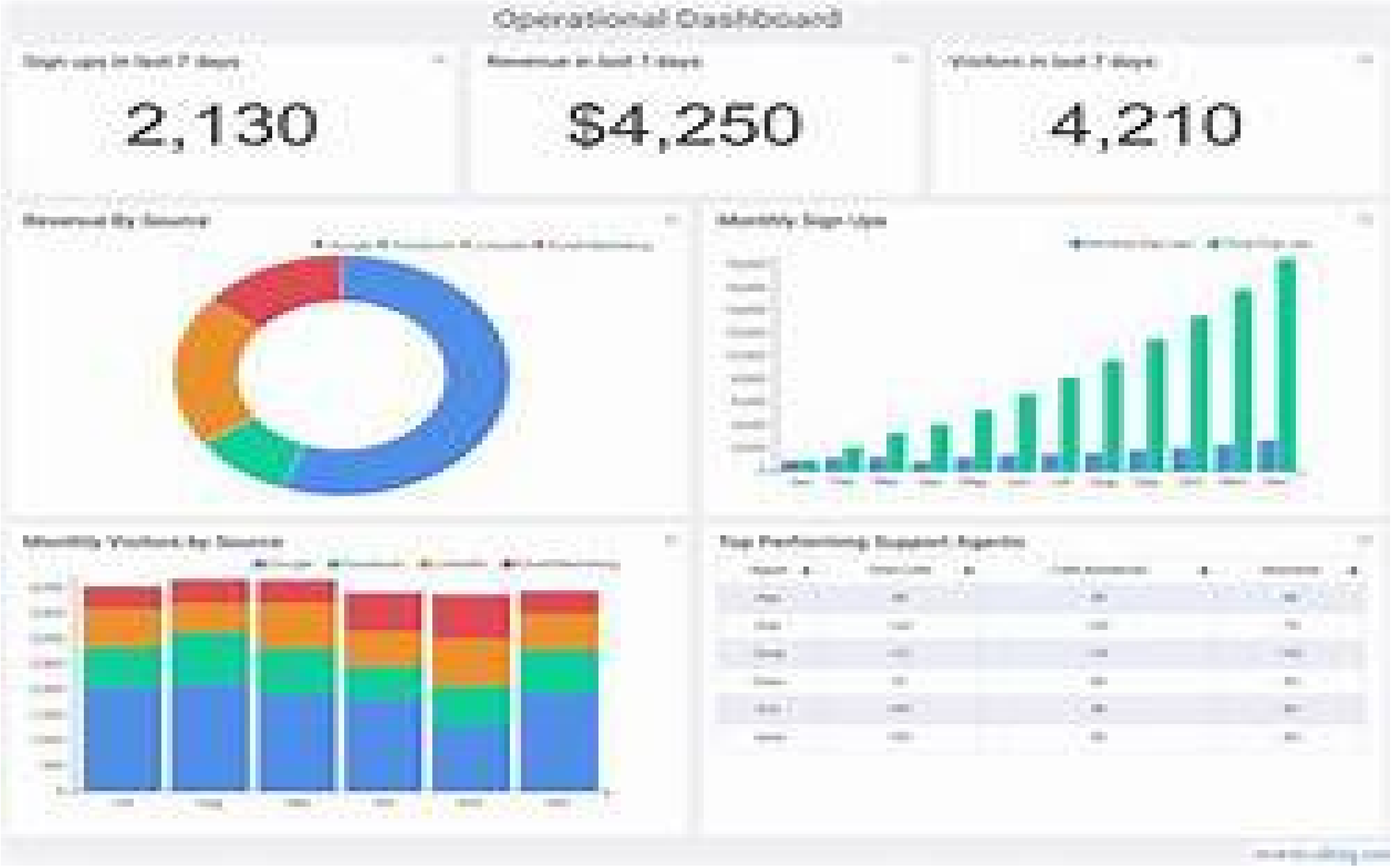
Help Search Settings

New Opp

Opps In Process

FDIC PM Support
SSA Survey Support



Completed Opps

DoD Cyber Security Support
DOL Statistician Support
FEMA Program Management
CDC HIV Support
OPM Position Classification Support
IRS Financial Management
FAA Marketing Support
HUD Real Estate Support
Census 2030 Program Support
Army Virtual Learning Environment

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Logo

Help Search Settings

NOT A SCREEN - Overview of Sub-Options available under each Menu Option

New Opp

- Plan
- Build
- Write
- Recover
- Review
- Evaluate
- Finalize
- Submit
- Archive
- Post Submission
- Doc Generator
- PAL – Proposal Asset Library Management
- Analytics, Insights, & Reports
- Settings

Plan	Build	Write	Recover	Review
-Initialize Workspace -Proposal Info -Business Logic (proposal level) -Partner Info -Requirements -Personnel -Past Performance -Proposal Roles -Proposal Schedule -Proposal Task List -Proposal Kickoff	-Formatting Guidelines -Template Selection -Define Volumes -Build Outlines -Prepopulate Content -WRAM (writer & reviewer assignment matrix)	-Content Collaboration & Development -Data Calls	Check out document in SharePoint to pause all collaboration Make any updates - Address content contributed by authors and finalize doc for the next iteration Post recovered doc back in SharePoint and send announcement to the team ***Any Programming??***	-Build Compliance Matrix -Peer Review -Conduct Compliance Review

Evaluate	Finalize	Submit	Archive	Post Submission
-Eval Criteria -Build Eval Rubric -Conduct Evaluation	-Build proposal checklist -Finalize all docs, convert to PDF, Conduct final review (senior management) -Set a flag that the proposal is finalized and ready for submission	-Set finalized flag (approval) -Submit the proposal using the submission info defined under proposal info – generate email with all finalized docs	-Storage – lock versions – Place finalized proposal knowledgebase -Revoke permissions to the SharePoint site (set a flag) -Set completion flag / archive flag	-Inform the team of submission -Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager. -IFNs/BAFO Management

Doc Generator	PAL	Analytics, Insights, & Reports	Settings	
-Doc Generator	-Proposal Library -Content Library -Graphics Library -Resume Library -Master Past Performance Refs -Custom Past Perf Refs	-Performance Metrics -Reports Generator -Lessons Learned -Strengths Registry -Proofpoints -Partner Evals -Debrief Info -CPARS Info	-Org Info -User Access & Permissions -Template Library -Business Logic (company level) -Proposal Activities -Preferred Partner Listing	

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Progress Bar

Plan — Dev — Compliance Review — Evaluation — Final — Submitted

25% 50% 75% 100%

Opps In Process

FDIC PM Support
SSA Survey Support

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Display Space

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Help Search Settings

Only an admin should see all of the options for completed opps

Completed Opps

DoD Cyber Security Support
DOL Statistician Support
FEMA Program Management
CDC HIV Support
OPM Position Classification Support
IRS Financial Management
FAA Marketing Support
HUD Real Estate Support
Census 2030 Program Support
Army Virtual Learning Environment

Reports & Docs

Display Space to view reports and docs

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Help Search Settings

Progress Bar

Plan — Dev — Compliance Review — Evaluation — Final — Submitted

25% 50% 75% 100%

New Opp

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(select opp type)
RFP
RFQ
SubK
Quote
Commercial
RFI
MRAS

Display Space

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Help Search Settings

Initial View of selected opp??

Name of Opp

- Plan
- Build
- Write
- Recover
- Review
- Evaluate
- Finalize
- Submit
- Archive
- Post Submission
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<Calendar>

<List of Proposals>

<Data Calls>

<WRAM Status>

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Help Search Settings

Settings > Org Info

Company | Customers | Criteria

Company Profile
(Company, Address1, Address2, City, State, Zip, DUNS, CAGE, Web, Phone)

Company Certifications
(Cert ID (auto-generated), Cert Description, Exp Date)

Company SocioEcon Designations
(SED ID (auto-generated), SED Description)

Company POC
(Name, Title, Email, Phone)

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Help Search Settings

Customers - this screen should list the customer info collected when entering the proposal info. It should only be a display screen under report generator – maybe a customer report

Company | Customers | Criteria

New

Display List of customers

Display customer info

<When new is selected – open a different screen to collect the data. See requirements for fields that should appear that the user should enter >

Logo

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Help Search Settings

Company | Customers | Criteria

Criteria

Prop Activities for Schedule
(Provide a list of proposal activities that should be used for each schedule)

Prop Directory Structure
(Define the directories that will be used for each prop and RFI. Challenge will be how to set up directories if using Dropbox, Google, SharePoint, OneDrive, Corp Network Drives)

Templates
(Company will load their specific templates for doc generation. Each template that should be used will need to be mapped to the system artifact.)

Business Logic
(Allow company to enter in business logic regarding proposal processes such as:
-Kickoff must occur w/i 3 days of bid approval date
-Prop must be ready w/i 2 days prior to due date)

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Data Calls – Under the Write Menu option

New

- Plan
- Build
- Write
- Recover
- Review
- Evaluate
- Finalize
- Submit
- Archive
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Data Calls

<List all data call items here with status – Maybe a dashboard with open, past due, completed data items>

<When new data call item is selected – see requirements for fields that should appear that the user should enter – open in a new screen>

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Help Search Settings

Schedule – under the Plan menu option

New

- Plan
- Build
- Write
- Recover
- Review
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Schedule

<Show calendar with all open prop activities listed>
<When new is selected – the user should be able to select an activity (pulled from activities loaded under Criteria) and place it on the calendar. The proposal code will have to appear so that you know which prop is associated with each activity>

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Help Search Settings

Doc Generator

- Plan
- Build
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<Module which allows development of Proposal Planning, Monitoring, and Controlling artifacts. User should be able to select the artifact. The system pulls the assignment template and populates by pulling data from the database. Artifact should be able to be previewed, printed, saved (by format), and exported. Each of the artifacts will need to have a template associated with it. Pull from the templates already defined under Criteria.>

Proposal / RFI Directory
RFP Summary Brief
Capabilities/Gap Matrix
Strengths Registry
Proofpoints
Past Performance Template
Q&A Form
Subcontractor Consent
Proposal Schedule
Key Personnel Position Descriptions
Resume Template
Letters of Commitment Template
Proposal Production Checklist
Writer and Reviewer Assignment Matrix (WRAM)
Compliance Matrix
Master Data Call
Data Call Tracker
Proposal KO Brief
Review Briefs
Evaluation Rubric/Scorecard

Maybe have a dropdown where the user can pick multiple artifacts to generate.

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Define volumes and build the outlines

New | Generate

- Plan
- Build
- Write
- Recover
- Review
- Evaluate
- Finalize
- Submit
- Archive
- Post Submission
- Doc Generator
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Define Volumes → Build Outlines

<Module which allows development of Proposal Volumes and associated docs.
User must provide the volumes that are required for the proposal first. See notes in the requirements (Proposals). This module is for building the outlines for each volume to include the Yellow, Blue, and Green boxes>
<Via Generate button - Artifact should be able to be previewed, printed, saved (by format), and exported.>

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Performance Metrics | Reports Generator | Lessons Learned | Strength Registry | Proofpoints | Partner Evals | Debrief Info | CPARS Info

- Plan
- Build
- Write
- Recover
- Review
- Evaluate
- Finalize
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<Module which allows for entering, tracking and using performance information such as Lessons Learned, Strengths, Proofpoints, Partner Evaluations, Debrief Info.
See notes in requirements doc>