QUICK REFERENCE GUIDE: USDA/OSDBU PROCUREMENT FORECAST SYSTEM (PFS)

DOWNLOADING, INSTALLING AND USING THE DATA COLLECTION, CONSOLIDATION AND REVIEW PART OF THE PROCUREMENT FORECAST PROGRAM

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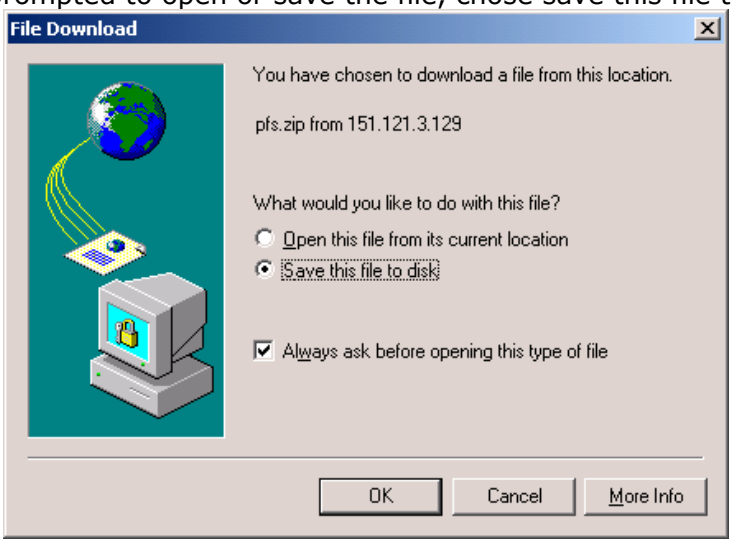
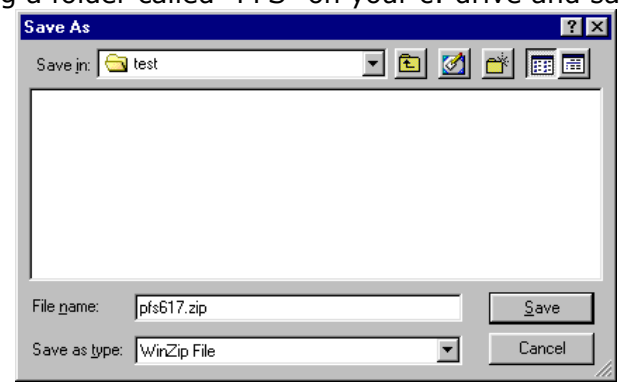
1. DOWNLOADING THE PROGRAM

Use a browser (e.g., Internet Explorer or Netscape) to go to the following URL: http://151.121.3.129/osdbu/pfs.zip

When you get prompted to open or save the file, chose save this file to disk:



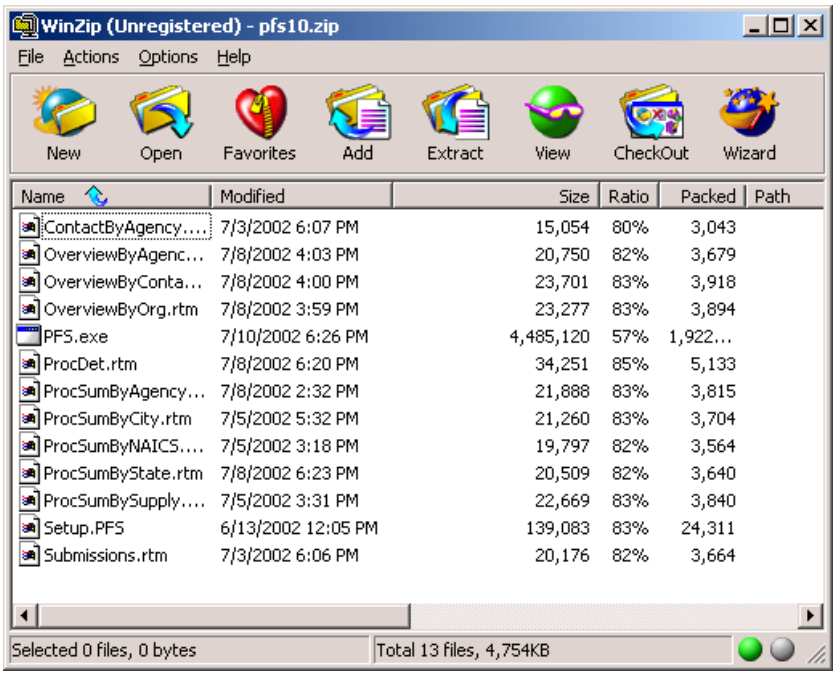
Save file to your hard drive, in a location that you will remember (I would recommend creating a folder called "PFS" on your c: drive and saving to c:/pfs):



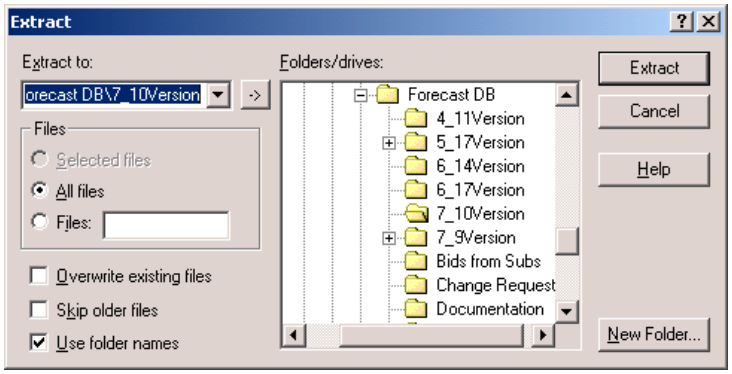
2. UNZIPPING THE PROGRAM

You will need to have a zip/unzip utility installed on your PC to open the program (if you do not have one, either call your helpdesk and ask them to install WinZip to your computer, or go to www.winzip.com and follow the prompts to install it yourself). Note that if you go to www.winzip.com, you will want to download the evaluation copy (make sure to follow up with a valid license purchase for the product) by pressing the appropriate download button. This will install the installation program/application for WinZip on your PC. Then, you will have to navigate back to the downloaded installation application, and double click on it to install it!).

If you have such a utility on your computer, then simply double click the file "pfs.zip" and it should prompt you to unzip / extract the two files associated with the Procurement Forecast program. The window you come to will look as follows:



Extract ("save") these files by pressing the extract button. You will then come to a standard file browser window that will allow you to save the program where you wish:

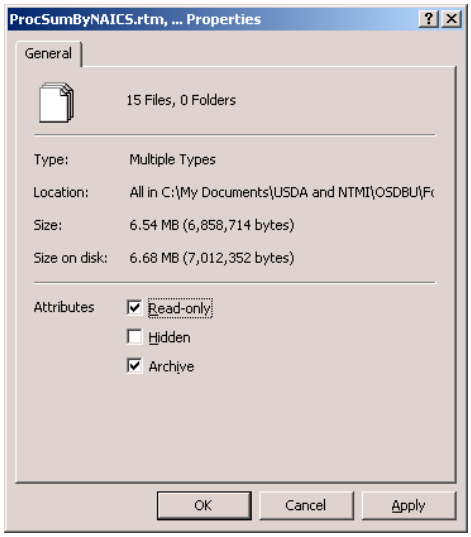


Navigate to the SAME drive into which you saved the pfs.zip file that you downloaded from the website (by clicking in the folders/drives window), and then press the 'Extract' button.

3. INSTALLING THE PROGRAM

Close the WinZip Windows and Navigate to the folder into which you have chosen to extract your files (again, in my sample, c:/pfs). Open the folder by double clicking on it, and verify that the files are there. <u>There is no additional installation needed.</u>

NOTE: If the program is provided to you in a format other than online download – for example, on a CD – then you will simply have to save all of the files in a single directory on your hard drive. First, save the files. Then, verify that the file properties are not set to read only by going to that directory, holding down the CTRL key and then pressing the "A" Key (to select all files). Once all files have been selected, right click on your mouse, scroll down to properties, and select (left click on) "properties". Then, look at the box next to the words "read-only." If it is checked, as in the following example, then uncheck the box and press OK/Apply.



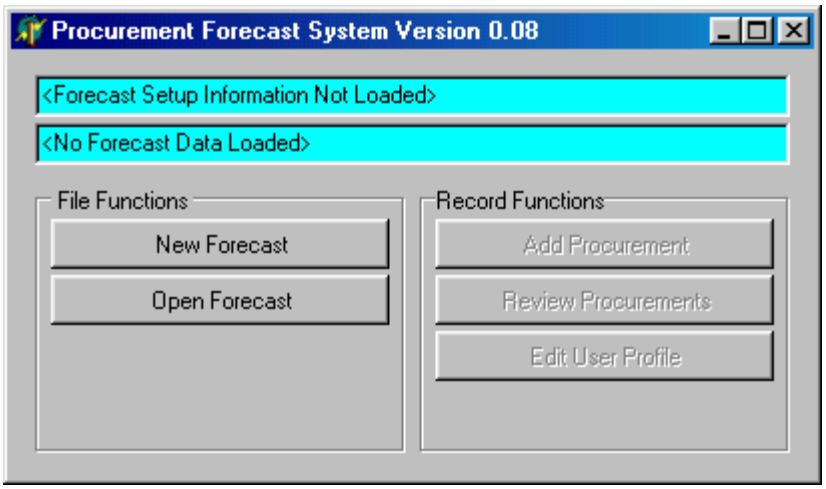
Regardless of how you do it (e.g., by web download or copying from a CD), these will be the only files you need to run the basic program – regardless of whether you are a collector, submitter, reviewer or administrator. As the data moves through the system, you will have your own (saved) individual forecast records to deal with, but the program only needs these files to operate.

The program has just been downloaded and extracted. You are now ready to begin entering data into the system.

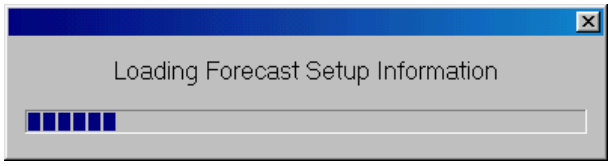
4. STARTING THE PROGRAM

To start the program, double click the pfs.exe icon. NOTE: You will not be able to open the program in any other application (e.g., MS Access or MS Word). This program was custom designed in a Delphi-Based Database application for OSDBU. You must enter by double clicking the pfs.exe icon.

You will come to the following Introductory Screen:



If you have not already started a forecast submission / review, press "New Forecast" and the setup program should load:

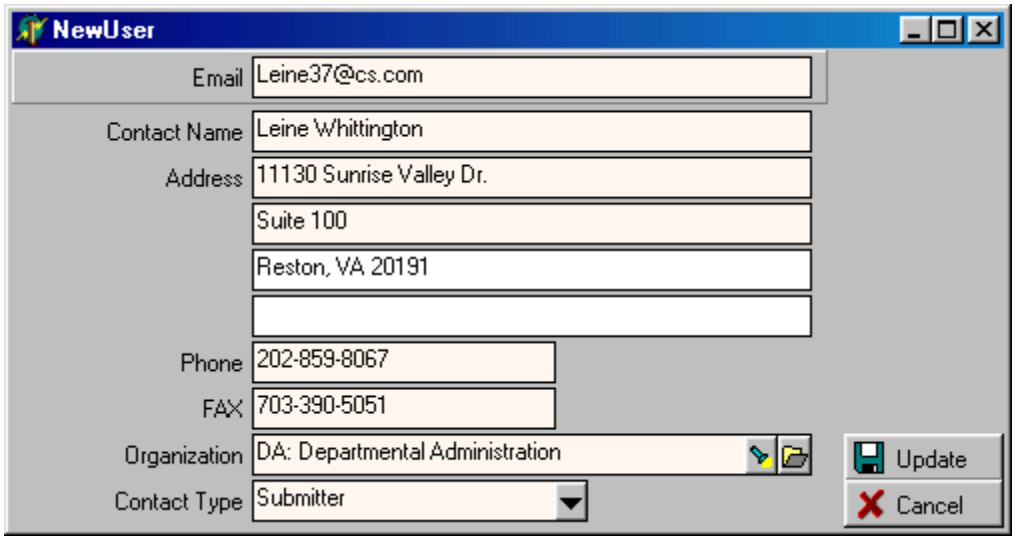


If not – you will need to follow the browse prompts to the setup file. NOTE: Again, make sure that the setup file is not marked read only (do this by right clicking on the set up file and going to properties. If the box "read only" is checked, uncheck it by single clicking on the checkmark and pressing OK). Also, the program will not run correctly if you have not properly extracted the files out of WinZip. Review Directions above for how to do this.

NOTE: If you inadvertently press "open forecast" at this point, a browser window will appear that tells you it is looking for a *.pfs file. If you have not created and saved a *.pfs, then you will not have anything to navigate to. Close the window and press "new forecast."

5. ENTERING IN CONTACT INFORMATION / PASSWORD FOR SUBMITTER

Once you press "New Forecast" – the first screen you will come to is the POC screen. Fill in the information as indicated. <u>All fields are mandatory</u>. A sample follows:



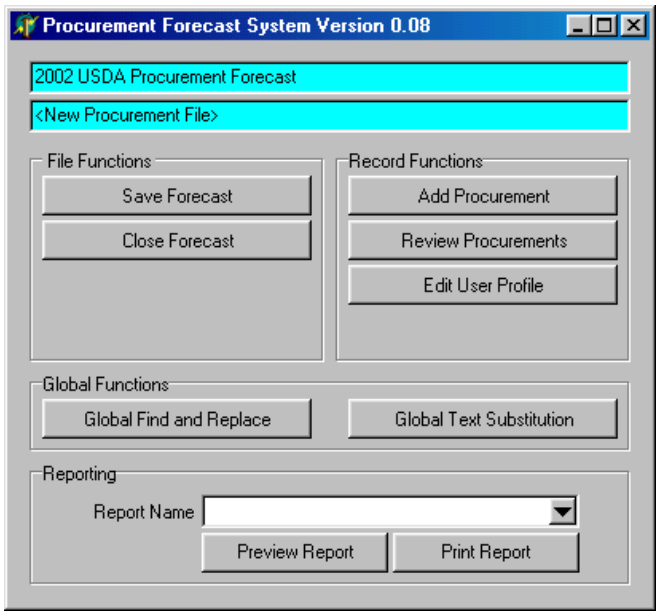
Then verify your information (you can overwrite to modify or press the "Cancel" button to cancel), and press the "Update" button (NOTE: this does NOT save your information to disk – you will still need to do that later – see below). Note also that all fields are mandatory, and you will be prompted to return to the form and fill in any information that is missing before you will be allowed to update.

NOTE ON PASSWORDS: There is no password for individuals who identify themselves as a "Submitter." This is the default setting. All individuals who are doing the initial data collect/consolidation/input of records for a particular agency and who will need to send their data to a mid-level reviewer are considered, for the sake of this program, a "Submitter." Those individuals who will be importing procurement forecast items from submitters and reviewing them will be either a "Reviewer" or an "Administrator." These contact types will require a password (see section below for reviewer password. See separate documentation for administrator password.)

You will no longer have to reenter this information as every record you create in this particular forecast will be assigned to the individual whose name, address, phone, fax, organization and contact type was entered at this screen! As you create new records, the information will not automatically pop up on the screen. It will only appear on the screen after you have SAVED the forecast.

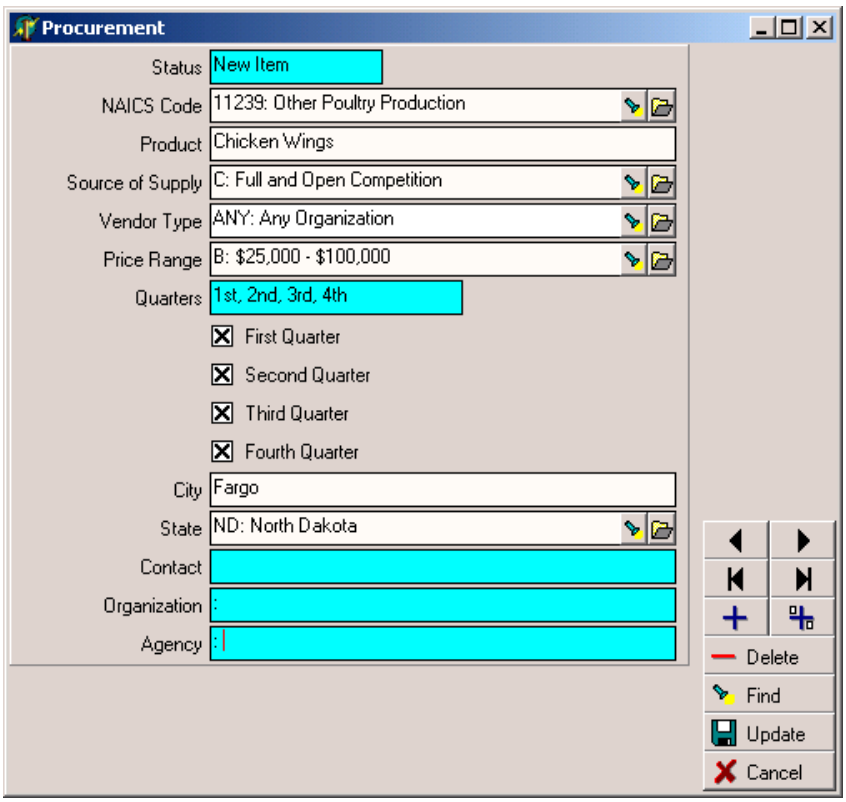
Note – if in the future, you need to create a forecast where a different individual is responsible for the forecast items – simply reenter the program and create a 'New Forecast' and enter in their information.

You are now in the initial forecast screen – from where you can add or review procurement records / items, edit your profile, perform global search and replace functions or print reports:



6. ENTERING IN YOUR FIRST PROCUREMENT RECORD

Press "Add Procurement" to begin adding records and populate the blanks as indicated.



The following are some tips about the above screen…

- You will not have to fill in "Status" – that will happen automatically.
- The following fields are "lookups" (meaning that there's a list of items from which you must choose: NAICS, Source of Supply, Vendor Type, Price Range, and State). As you start to type – they should autopopulate with data, once the correct data appears, you can simply Tab to the next field.
- NAICS Code is a lookup field. If you begin to type – it will begin to autopopulate the numbers you have entered with the closest numeric match and its description. If you keep typing, the NAIC Code string will change depending upon what you type. **If there are multiple NAICS codes with the same text description, please choose the longest NAICS code with the appropriate description (in other words NAICS 927, 92711 and 92711 are all identified as Space Research and Technology – please choose 927110).** If you need to browse the list of NAICS, simply press the button that looks like a flashlight to the immediate right of the NAICS blank and you will go to the full list of NAICS – starting with the number you have already entered. You can then peruse the list to find the exact NAICS you are looking for. NOTE: the NAICS list is ordered by NAICS code/number. If you type in the text description in the "Find NAICS" box, it will not be able to find the code for which you are looking – you must type in the initial **numeric** string of the NAICS to jump to a particular NAICS code.
- Vendor Type will autopopulate to a default selection. Chose another vendor type by pressing the button that looks like a flashlight to the right of the blank and double clicking on another Vendor Type.
- The following fields must be typed in (no "lookup"): Product Description (200 character limitation) and City. Note that you should reflect the specific details of the procurement in the "description" section – regardless of the verbiage of the NAICS Code Description. In the above example, for instance, the NAICS Code is 11239: Other Poultry Production, but what "Mary Smith" is actually intending on procuring is "Chicken Wings."
- You will not have to fill in the blank next to the word "Quarters" – that will fill in when you check the individual quarter boxes (you can either check those boxes by single clicking in them with your mouse, or by Tabbing to that box and pressing the spacebar.)
- City and State refers to the Point of Delivery (Supplies) or the Place of Performance (Service Procurement) - NOT your city and state, necessarily (unless you as the POC happen to live in the same city and state to which the item is being delivered or the services will be performed). Contact USDA/OSDBU Point of Contact for Procurement Forecast if you have questions about whether or not to enter in the actual city/state, or the closest major city/state to the eventual period of performance. REMEMBER that Place of delivery is entered to give the vendor an idea of the potential delivery costs or costs associated with performing onsite service.
- Contact, Organization, and Agency – will not have to be reentered because you have already entered in this information when you first filled out the POC Screen. This information will become visible after you SAVE your forecast the first time.
- General – You will not have to specify the Fiscal Year for which you are entering data. This will have already been determined by the Program

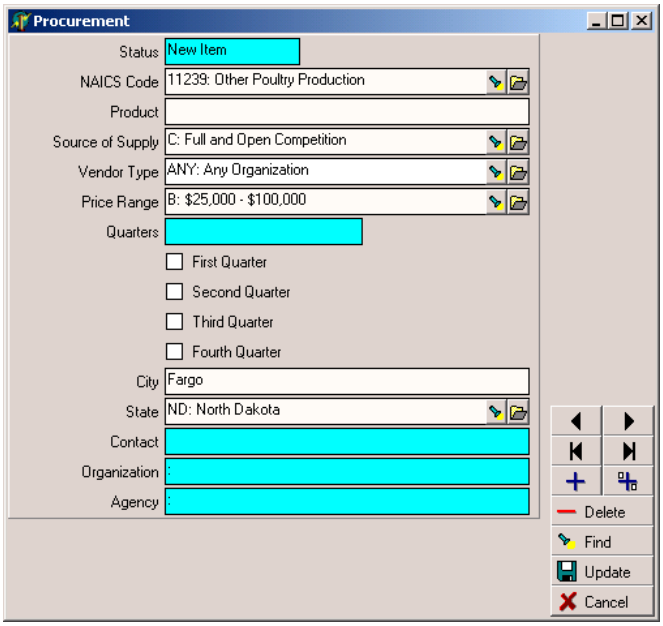
Administrator when the program is initially configured and setup for distribution.

NOTE: At any of the above blanks, press the button that looks like a flashlight to go to the list of lookup options, or press the button that looks like a folder to go to the individual details of that item.

You have now finished your first procurement forecast entry. Press "update" to update the information in the computer's memory (this is not saving it yet – see below), "cancel" to close this record without saving changes, or press either of the 'Blue +' buttons to begin another entry.

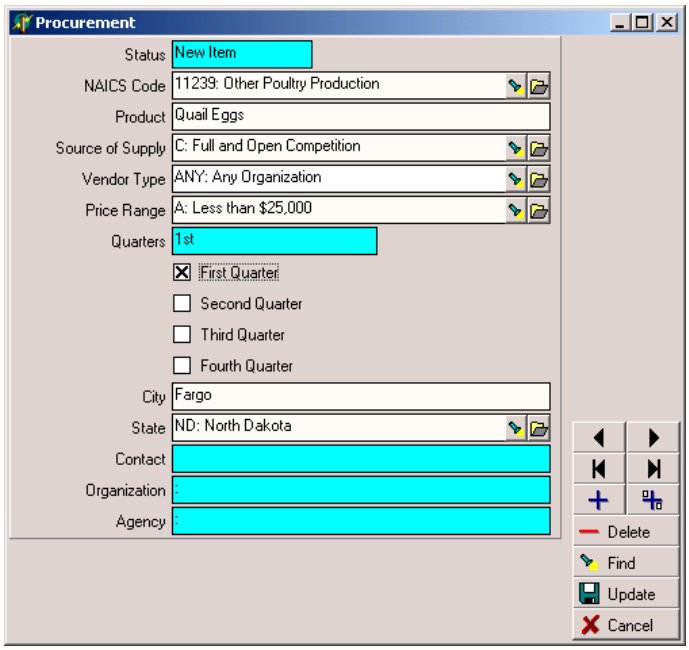
7. ENTERING IN ADDITIONAL PROCUREMENT RECORDS

The "Blue +" button to the right (with the little white squares in the NW and SE quadrants) will create a partial copy (aka "a sticky copy") of the record you were just in. For example, if I press it from the above entry, I will get the following screen:

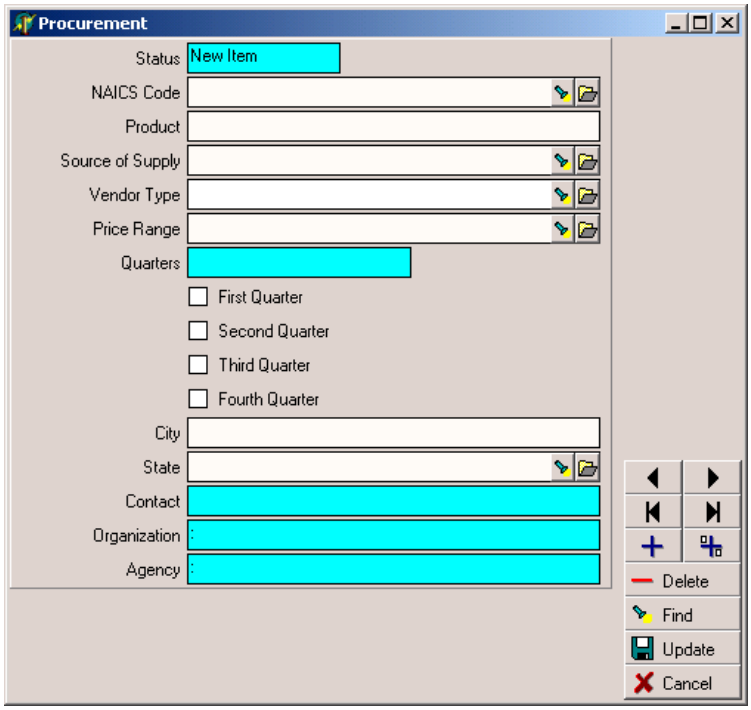


Notice that the following keys are "**sticky**" (e.g., they will retain the information from the last record unless you choose to change them): Status, NAICS Code, SoS, Vendor Type, Price Range, City and State. **This is purely for the convenience of the individuals entering in data when they are entering in a number of similar procurement items – it should make the process go much more smoothly and rapidly!**

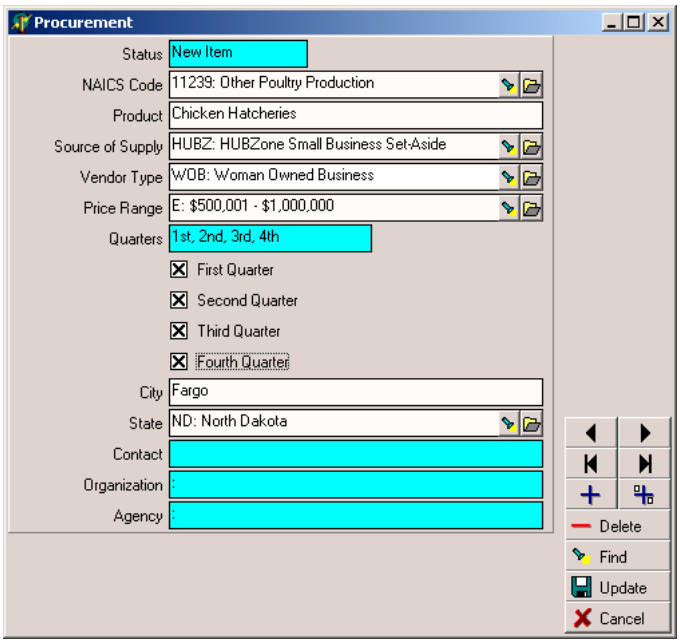
Populate the remaining blanks as appropriate, and then press the "Blue +," to continue adding procurements, "Update" to update and close the window, or "Cancel" to close the record without saving it. For example.



On the other hand… pressing the "Blue +" to the left (without any white) will simply open a new, clean procurement forecast item – with no "sticky" keys, as follows (NOTE: If you get to the following screen by mistake – in other words, if you meant to do a partial copy of the record, but you opened a totally blank record instead – simply press "cancel." Then, go back to "review procurements," double click on the record you wish to copy, and press the "+" with the white NW and SE quandrants) :



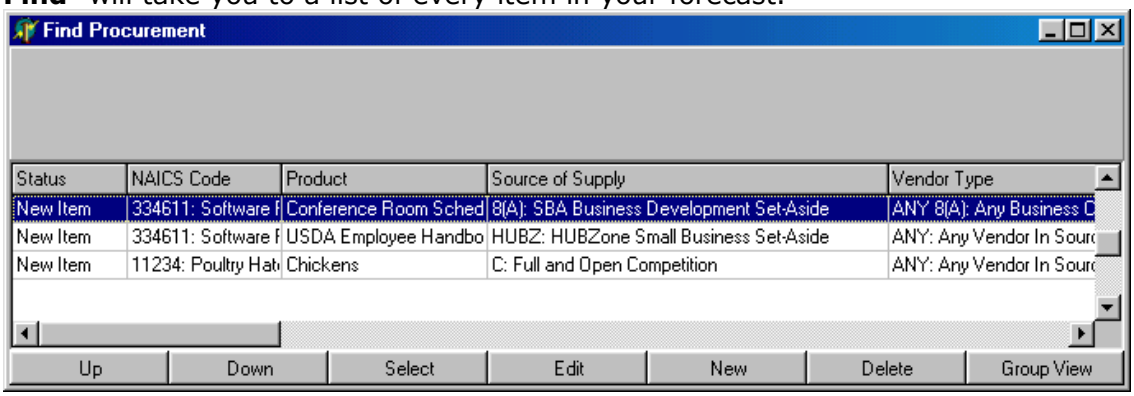
Populate all of the blanks as appropriate, and then press the "Blue +," to continue adding procurements, "Update" to update and close the window, or "Cancel" to close the record without saving it. For example.



NOTE: Now that you have more than one entry in your forecast, you may use the other buttons to navigate through your records. Hold your cursor over any of these buttons and you will get a pop up description of its function. In short, however:

- The left arrow will take you to the previous record.
- The right arrow takes you to the next record.
- The left arrow with the bar takes you to the first record.
- The right arrow with the bar takes you to the last record.

"**Find**" will take you to a list of every item in your forecast.



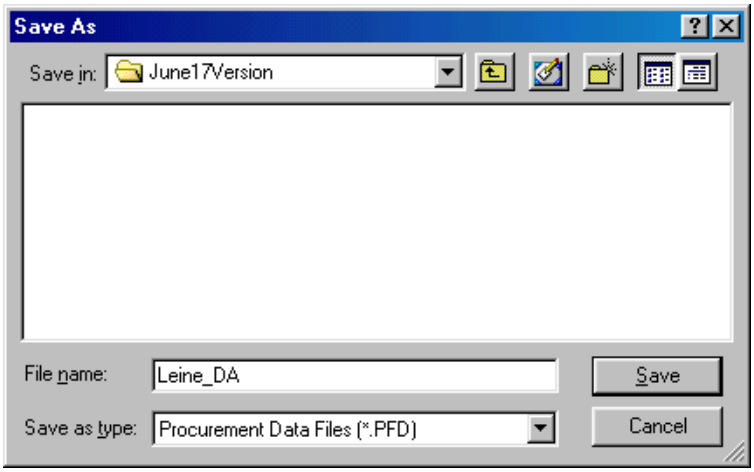
You may go to any record by double clicking on it.

8. SAVING AND NAVIGATING THROUGH YOUR PROCUREMENT FORECAST

After you press update – you will return to the main menu. You now have a number of options:

(a) **Save your Forecast** – VERY IMPORTANT. Remember that "updating" your records didn't permanently save them in the forecast. It updated them in the forecast, but you will still have to save your forecast. This is the ONLY way you can save your forecast. Do this by following the steps below:

- Press "Save Forecast."
- Browse to the location (local or network drive) in which you want to save your forecast (would HIGHLY recommend putting it in the same directory with your pfs.exe and setup.pfs but as long as you remember where you saved it and what you called it – you will be able to open it again in the future),
- Give it any name (in my example below, I call it "Leine_DA.pfd").
- Press SAVE.

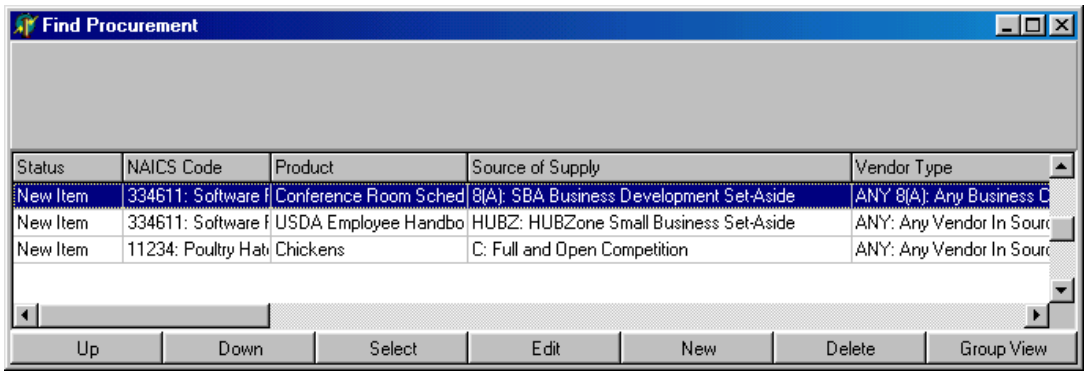


(b) **Close your Forecast** (either after saving or without saving) – Pressing this button will return you to the initial introductory screen. If you close your forecast after saving, you can now exit the program safely. If you close your forecast without first saving it, you will lose all of the contact and forecast items you just entered.

(c) **Return to your procurement forecast by adding a new item** (press Add Procurement, and you will come to a new – blank - clean record in your forecast).

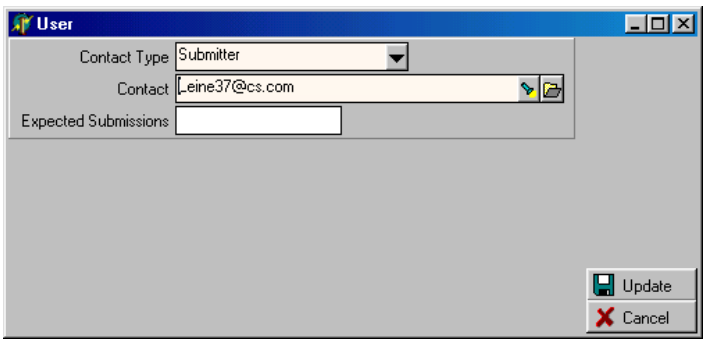
NOTE: If you are adding procurement records this way, you will end up having to type the entire first record (minus the contact information). This is the most useful method for entering in procurement forecast records that are of a totally different type, NAIC Code, and/or city/state than the records you have entered previously. See note under (d) below if you wish to add new items that were similar to items you have entered previously.

(d) **Return to your procurement forecast by reviewing all the records in a list** (press "Review Procurements" to get a list of your items):

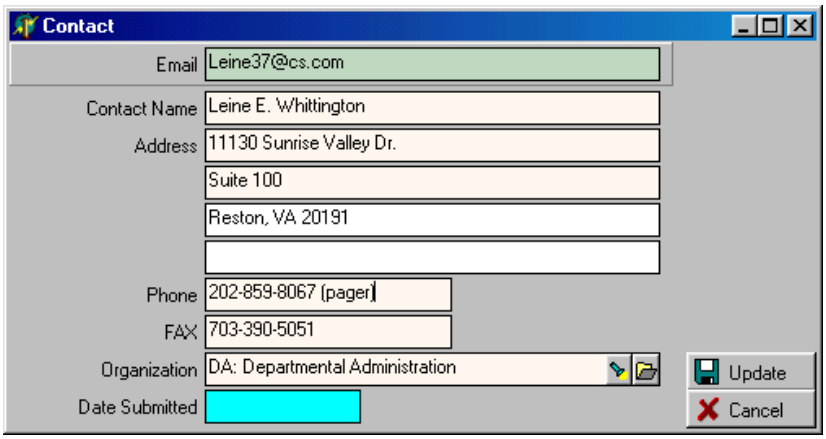


NOTE: if you wish to open an individual forecast record so that you may COPY it, go to this screen first. Then, double click on the record you wish to open (and consequently copy). Then, press the blue "+" with the white in the NW and SE quandrants.

(e) **Editing your Profile** – Press this button to change your contact type (NOTE: if you change from submitter to Reviewer or Admin, you will be asked for the password. If you don't know the password, you cannot change your status, your email address, or the number of submissions you expect to receive from other people – if applicable (NOTE: Default for a submitter is zero because you don't count your own submission):

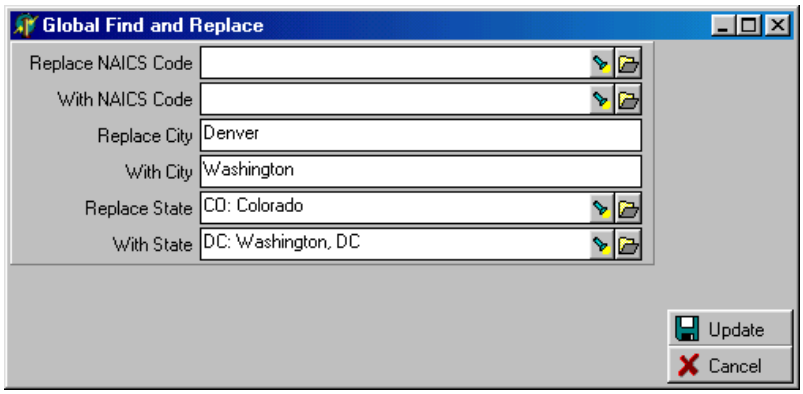


You can also change your other information (address… telephone number… etc.) by pressing the button that looks like a folder and going back to the initial screen:



In the above example, I added my middle initial to my name and added some text to my telephone to indicate that that was a pager number.

(f) **Use the Global Search & Replace** – This should be used to replace the entire content of the following fields with new content. In the sample forecast above, I had entered in one forecast item as being delivered to Denver, CO. If I find later than I needed it to go to Washington, DC instead, I would type in the following and press "Update":

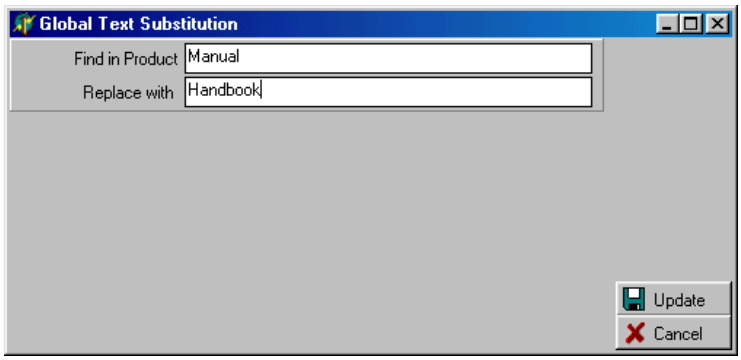


You will be notified as to how many records were updated:

Be careful with this feature! This is not like a word processing feature that will stop at every entry and ask you if you want to change the individual instance. This is a GLOBAL SEARCH AND REPLACE that will replace EVERY instance of what you select automatically!!!

(g) **Use the Global Text Replace –** Use this feature to change one word or a string of words that appears in your Product Description Line. In the sample forecast

above, I had entered in one forecast item as requiring 15,000 copies of the USDA Employee Manual. If I find later than I needed it be called the USDA Employee Handbook, I would type in the following and press "Update":



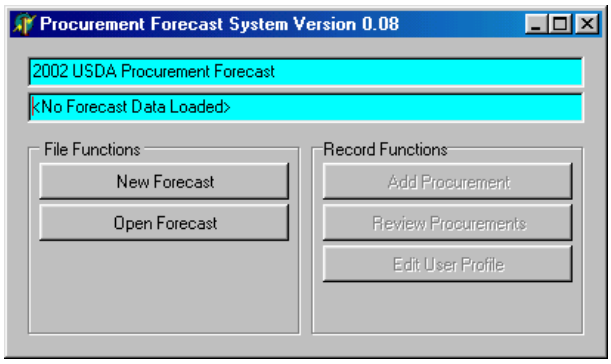
Again, You will be notified as to how many records were updated:

And again – be very careful with this feature! This is not like a word processing feature that will stop at every entry and ask you if you want to change the individual instance. This is a GLOBAL TEXT REPLACE that will replace EVERY instance of the word you have chosen automatically!!! So, if you had a number of Products that used the word Manual in the ID – all of them would be replaced with Handbook.

(h) **Run Reports –** See Major Subsection below entitled "Reports."

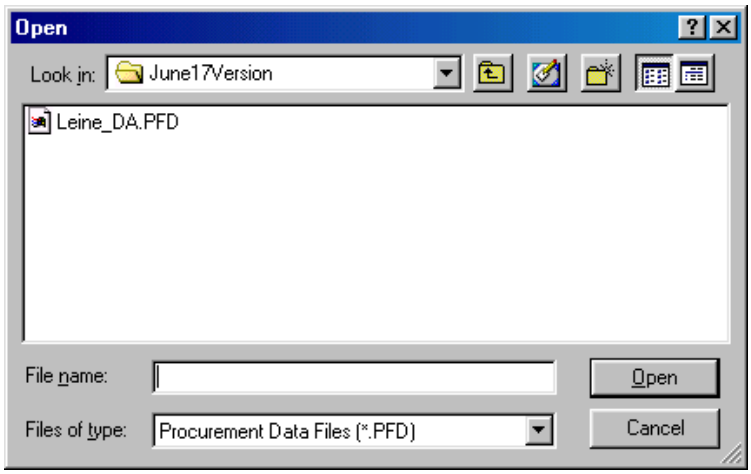
9. AFTER YOU CLOSE YOUR FORECAST, YOU CAN RETURN TO IT FOR FUTURE ADDITIONS / MODIFICATIONS:

Enter the program the same way you did initially – by double clicking on the pfs.exe icon.

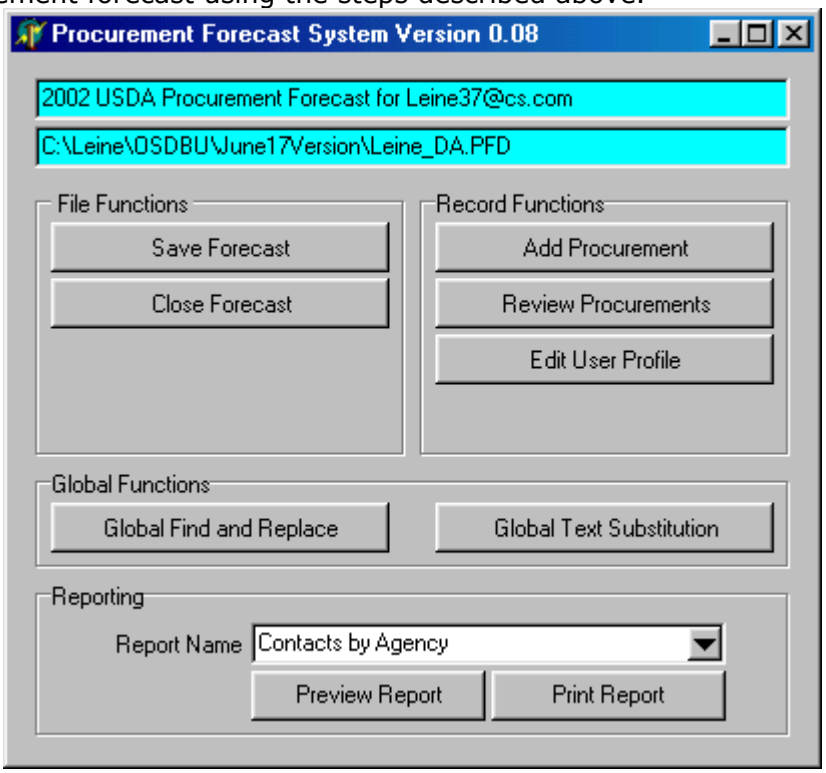


Note that the blue box at the top of the screen will tell you which Overall Forecast you are working on (as determined by the Setup File that was created by the Administrator and distributed with the program – in this case, the 2002 USDA Procurement Forecast). The bottom blue box tells you that you have not loaded your individual Forecast <no forecast data loaded>.

Press the "Open Forecast" button, and browse to your forecast (in my sample, I called my forecast "Leine_DA.pfd") – select this file (if not already selected) and press "Open."



You will now be back at the point in the program where you may add, review, etc. your procurement forecast using the steps described above.



10. SUBMITTING YOUR PROCUREMENT FORECAST TO THE NEXT LEVEL OF REVIEW

After you have finished entering in all your individual procurement records into your unique consolidated procurement forecast (and have both verified and saved the information within in), you are ready to submit your forecast (i.e., the full collection of forecasted procurement items) to the next level of review. Depending upon your agency and your position, this "next level of review" may be a mid-level reviewer, an agency-wide reviewer, or the USDA/OSDBU individual who will eventually consolidate EVERYONE'S records into the Main USDA Procurement Forecast for that Fiscal Year. Regardless – the process for submission is the same.

All you have to do is send (by CD, Floppy Disk, or as an attachment to Email) to your reviewer your forecast file. Your forecast file is the file that contains all of your individual forecast records. It will be named with a .pfd extension.

In my sample, I called my forecast "Leine_DA.pfd," and I saved it in the following place: C:\Leine\OSDBU\June17Version\Leine_DA.PFD. Everyone has their own preferences for names so the names will vary. Just remember what you called your forecast and where you saved it.

NOTE: There is NO need to send the pfs.exe and the setup file to the next level of review. All you need to send is your forecast.

Again, send your forecast to the next level of review or to the Administrator by one of the following means:

- Attach it to an email.
- Put it on a floppy disk and mail the floppy disk to the individual.
- Put it on a CD and mail the CD to the individual.

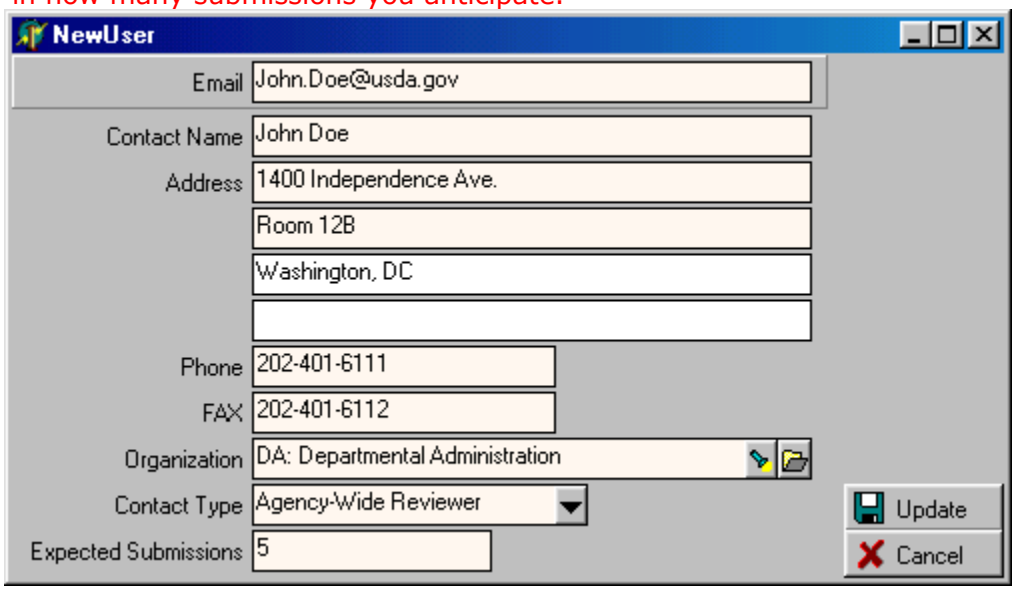
QRG: REVIEWER FUNCTIONS

11. STARTING THE PROGRAM.

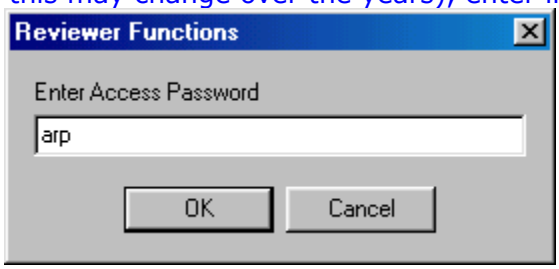
IF YOU ARE A REVIEWER OR AN ADMINISTRATOR, YOU WILL NEED TO ENTER THE PROGRAM IN THE SAME WAY (You will have all the functionality of the program as described above, but you will also have some additional functions. The Administrative Functions are described in a different document. The Agency-Wide Reviewer and the Mid-Level Reviewer functions are described here, and are the same).

12. REVIEWER CONTACT INFORMATION / PASSWORDS - REVIEWERS

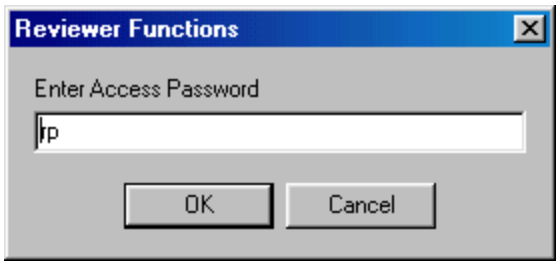
Remember to enter in yourself as a mid-level or an Agency-Wide Reviewer, and enter in how many submissions you anticipate.



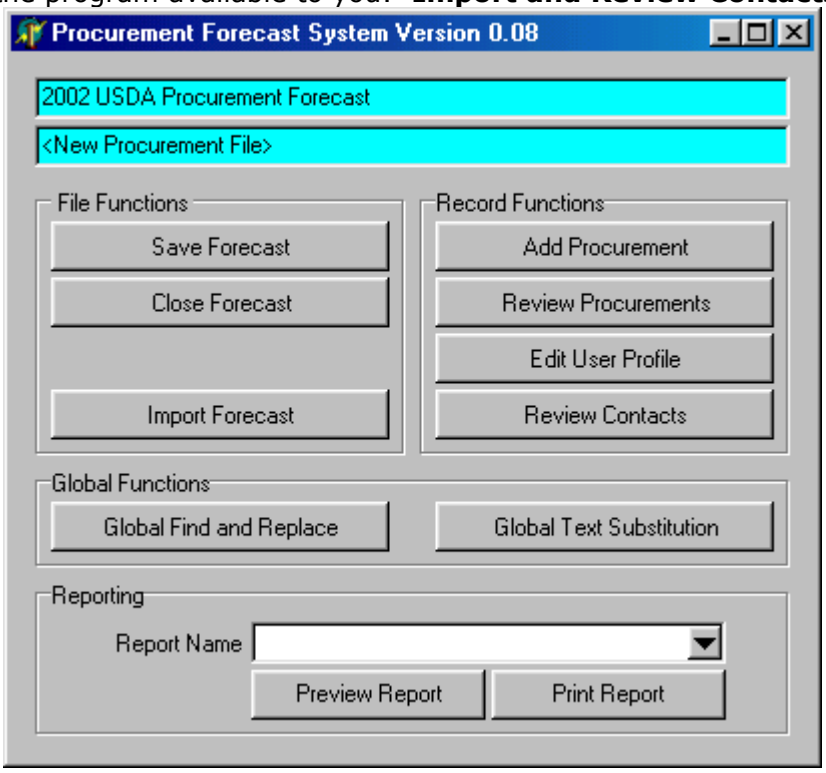
You will be prompted for a password. For **Agency-Wide Reviewers** (for testing & evaluation purposes – this may change over the years), enter in the following:



For **Mid-Level Reviewers** (for testing & evaluation purposes – this may change over the years), enter in the following:

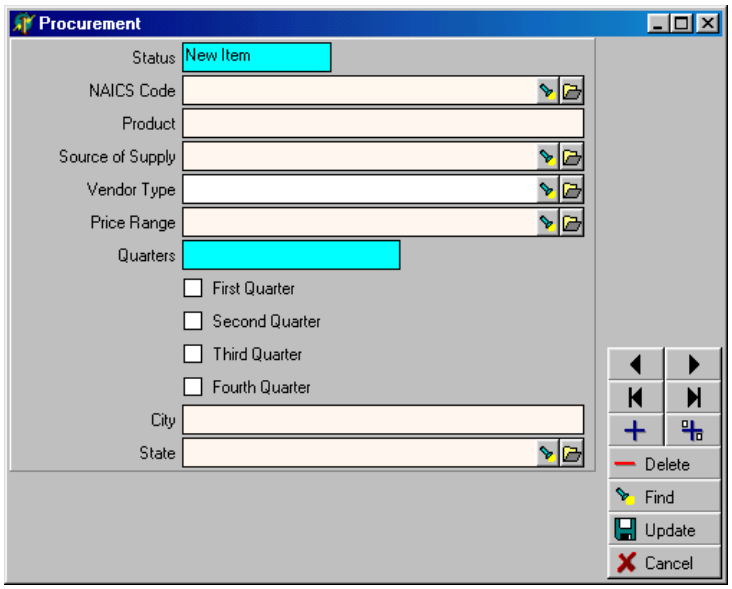


In addition to the features described above, you will also now have two additional features to the program available to you: **Import and Review Contacts:**

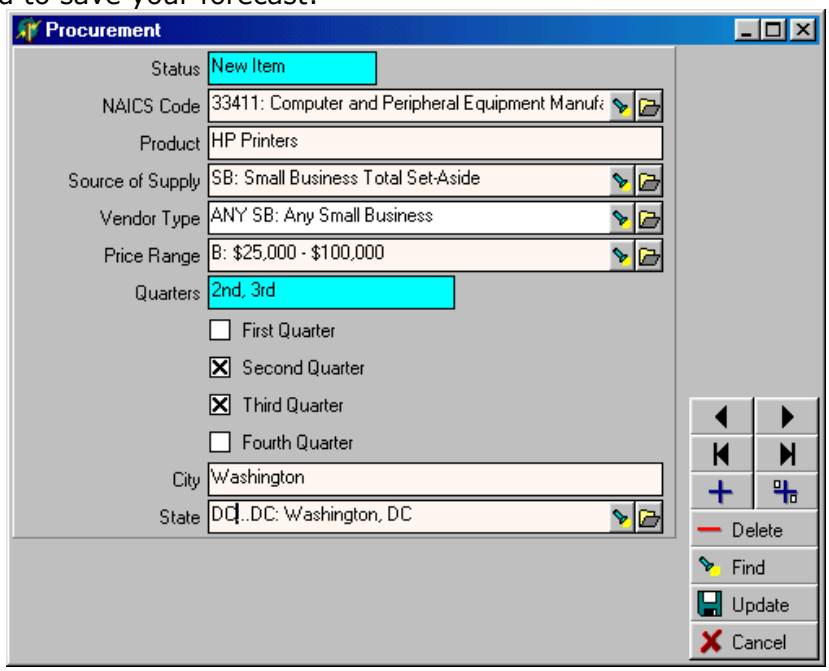


13. ADDING YOUR OWN FORECAST ITEMS – AS A REVIEWER.

If you not only have to review other people's forecast items, but also have your own items / submissions to add – do them in the same way. Press the "Add Procurement" button and type away:

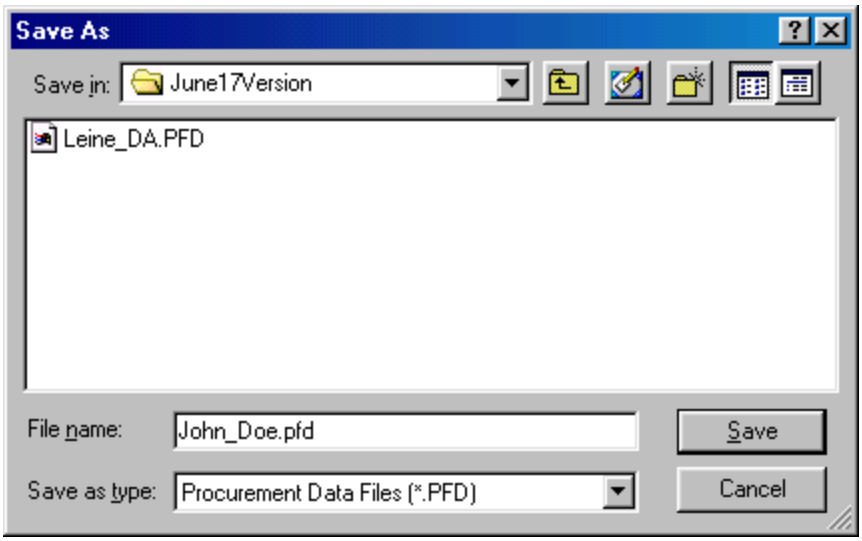


A populated sample might look as follows (remember – YOU are the POC now associated with this procurement item). Don't forget that after pressing Update, you will still need to save your forecast:



14. SAVING YOUR FORECAST

Save as described above (press save, pick a place to save it – preferably in same folder where the pfs.exe and the setup.pfs files have been located, choose a name and press SAVE.



If you DO NOT HAVE your own items / submissions to add – you will still need to save your forecast as the shell into which other people's forecasts will be imported.

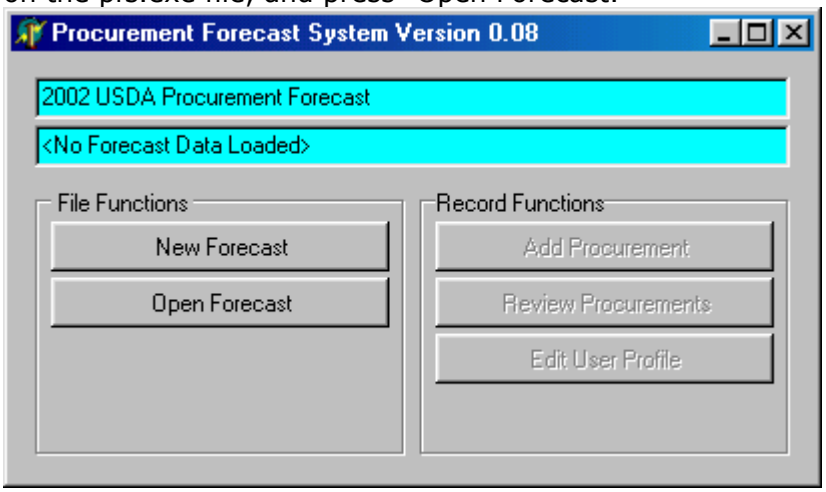
15. REVIEWING / IMPORTING FORECASTS:

You can review other people's forecasts in one of two ways: (1) opening their forecast as though you were them and then importing it, or (2) importing their forecast into your own and reviewing it from there. Let's look at a couple of scenarios:

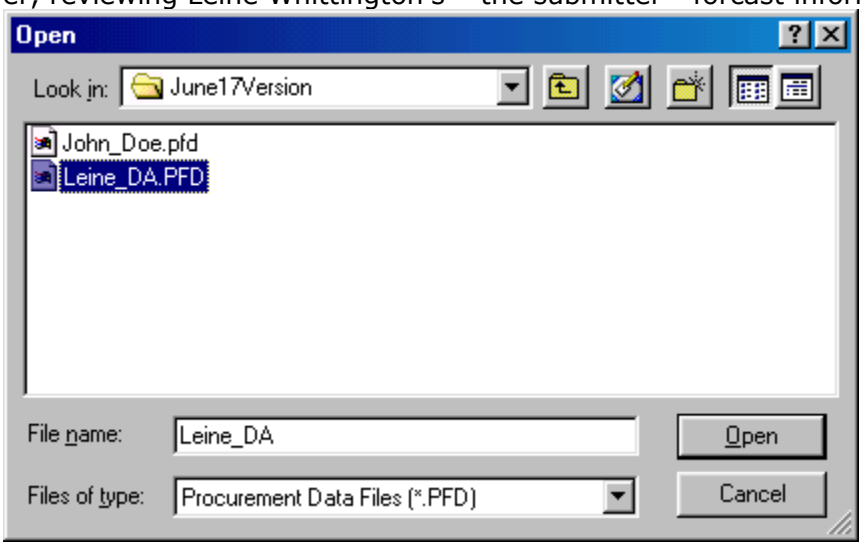
Scenario # 1

Perhaps there are some individuals who are new to the process of collecting Procurement Forecast information and submit imperfect information. You may wish to review their data prior to importing it into your own forecast.

To do this, save their file in a location that's easy for you to remember. Then, double click on the pfs.exe file, and press "Open Forecast."



Rather than selecting your forecast, select theirs, as follows (if I am now John Doe - the Reviewer, reviewing Leine Whittington's – the submitter - forcast information):

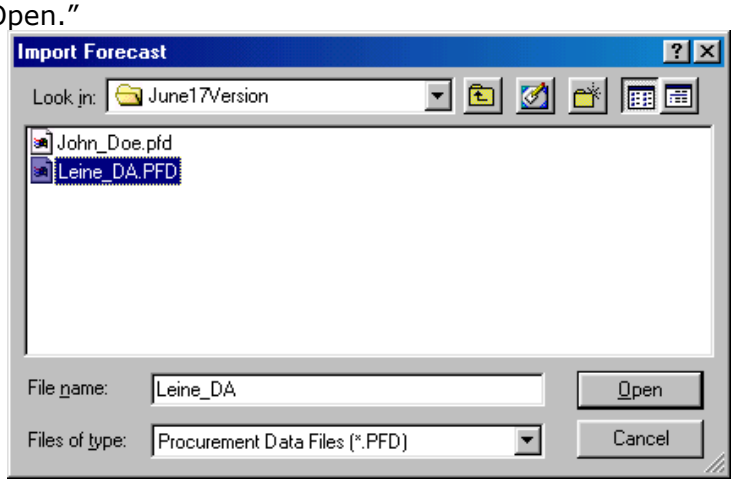


You will see **exactly** what Leine saw when she was collecting her information. Ergo, no import feature and no review contact feature. You will be able to browse her listings and print reports to verify that the information she sent is correct.

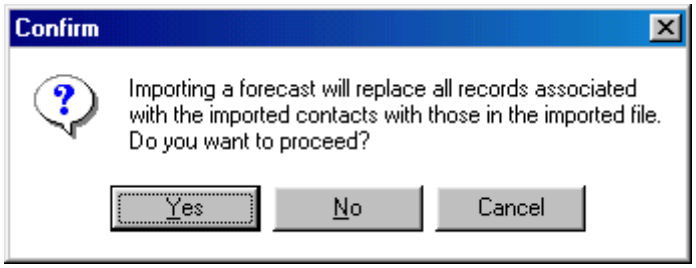
Note that the process of doing this will NOT change the point of contact for the forecast items from Leine Whittington to you, John Doe.

Once you are satisfied that her items are correct, you may exit the program (make sure to save if you've made any changes!), reenter the program, open YOUR forecast and import her forecast into yours.

Do this by pressing the "Import" Button, browsing to Leine's Forecast, selecting it, and pressing "Open."

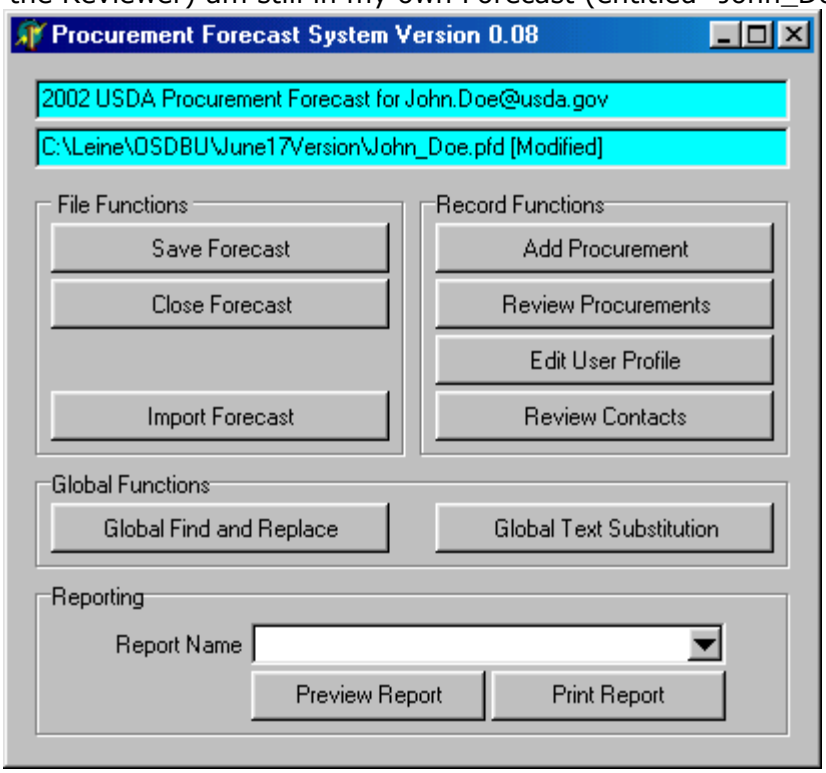


You will get a notification / warning that importing a forecast will replace all records associated with the imported contacts, and a prompt to proceed or not.

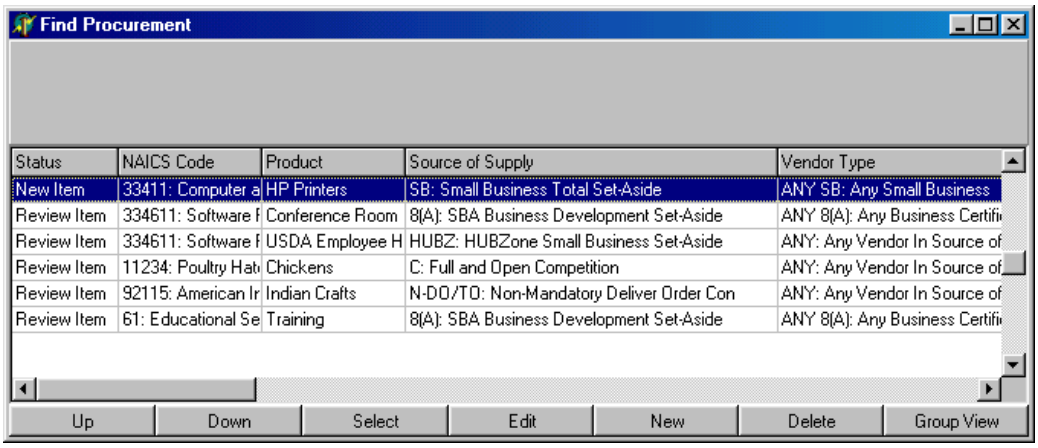


Choosing No or Cancel will get you out of the import. Choosing Yes will instruct the program to proceed with the import.

After the import, notice that the title at the top of the screen still indicates that I (John Doe – the Reviewer) am still in my own Forecast (entitled "John_Doe.pfd"):



If I review the records in my forecast, however, I will find the one record that I (as John Doe) added, along with all of the imported records from Leine Whittington (as submitter).



Status	NAICS Code	Product	Source of Supply	Vendor Type
New Item	33411: Computer a	HP Printers	SB: Small Business Total Set-Aside	ANY SB: Any Small Business
Review Item	334611: Software F	Conference Room	8(A): SBA Business Development Set-Aside	ANY 8(A): Any Business Certifi
Review Item	334611: Software F	USDA Employee H	HUBZ: HUBZone Small Business Set-Aside	ANY: Any Vendor In Source of
Review Item	11234: Poultry Hat	Chickens	C: Full and Open Competition	ANY: Any Vendor In Source of
Review Item	92115: American Ir	Indian Crafts	N-DO/TO: Non-Mandatory Deliver Order Con	ANY: Any Vendor In Source of
Review Item	61: Educational Se	Training	8(A): SBA Business Development Set-Aside	ANY 8(A): Any Business Certifi

Note that John Doe's record appears as a "new item" while the imported records from Leine Whittington appear as "review items" – this is because the import process tells the program that the imported records have been reviewed and approved.

Don't forget to save your forecast!

Scenario # 2

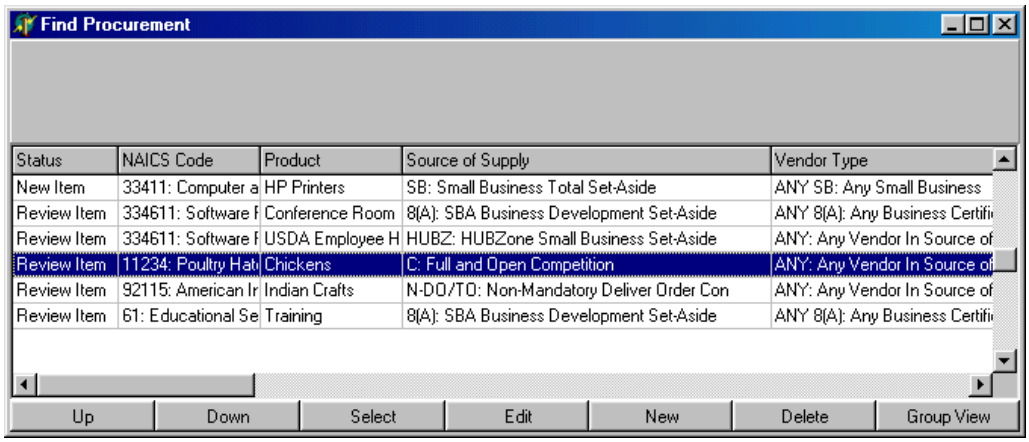
Perhaps there are some individuals who consistently, year after year, submit perfect data – no errors, the correct balances between large and small businesses, etc. You know that you really don't have to review their data because it is always correct. In this scenario, you may be comfortable doing a direct import of their data into your forecast without an initial review (after import, you will STILL be able to look at all the data and make changes based off of the reports, but you may not need to take the initial step of reviewing their forecast data).

All you have to do in this situation is open your own forecast, import their forecast into your own, and save your forecast!

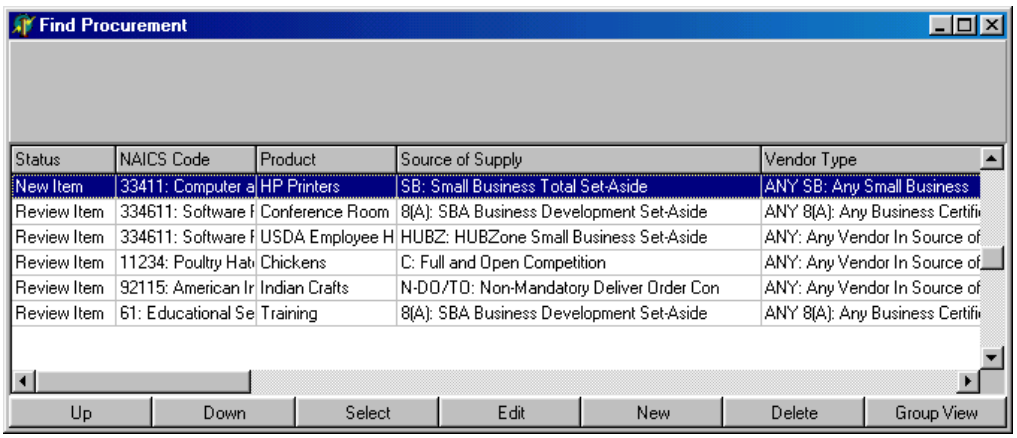
16. SORTING INFORMATION:

If you don't want to run a full report, but you want to sort things a different way – this is where going to "review procurements" and then to "group view" will be helpful. Note that this is not how you run reports. Rather, they are quick tool for helping Reviewers look at all the information in different ways.

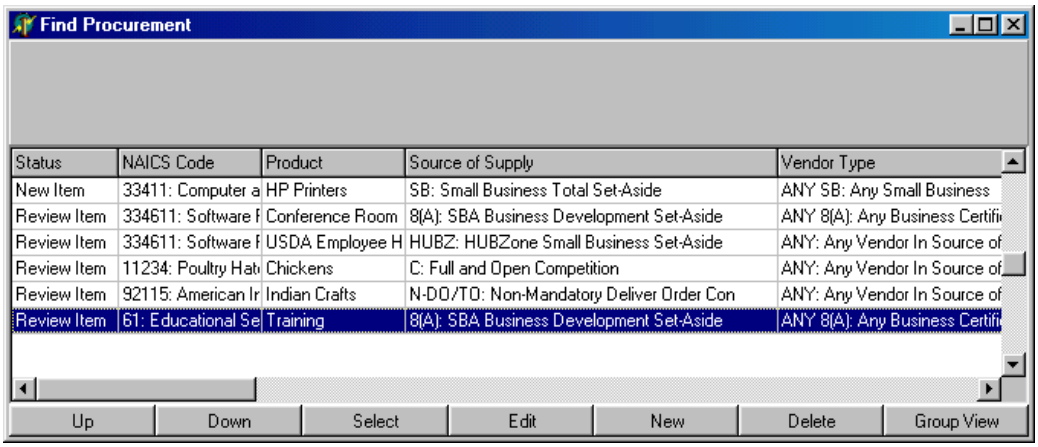
First, go to "review procurements" – you will get a screen that lists all the individual procurement items in the forecast you have opened – whether it be an individual forecast, an Organization-Wide Forecast or an Agency-Wide Forecast.



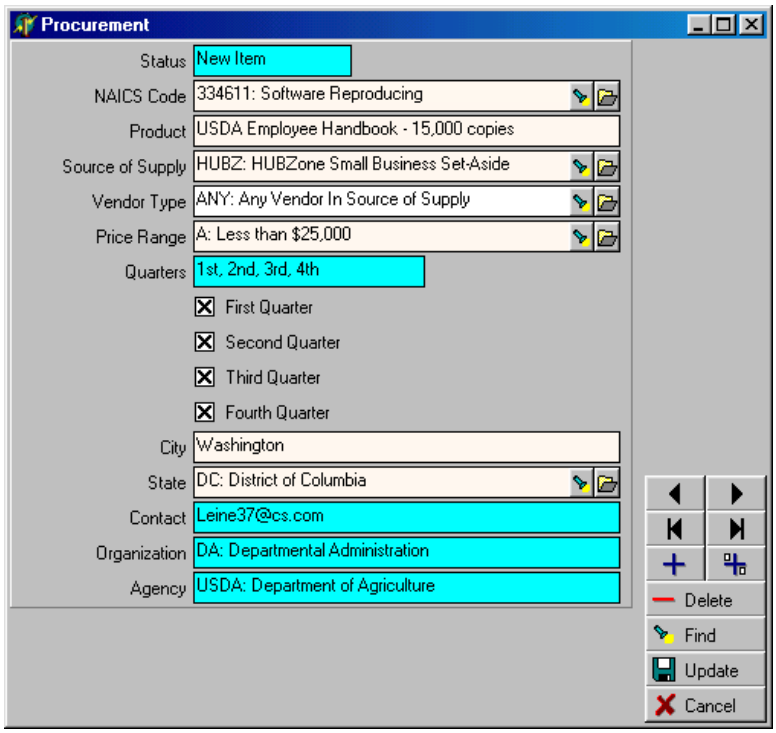
Press "up" to go to the first entry in the list – double click on this entry if you want to see the details or press "SELECT".



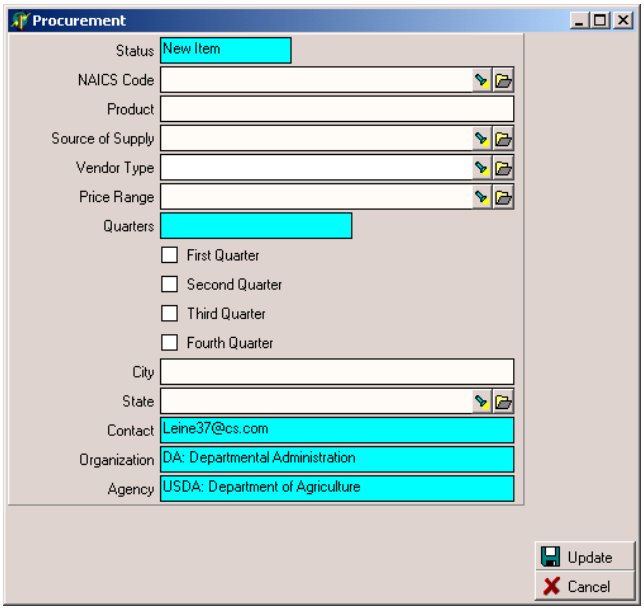
Press "down" to go to the last entry in the list – double click on this entry if you want to see the details or press "SELECT"



Press "edit" to go to the details of the record that was highlighted – you can also double click on this entry if you want to see the details.

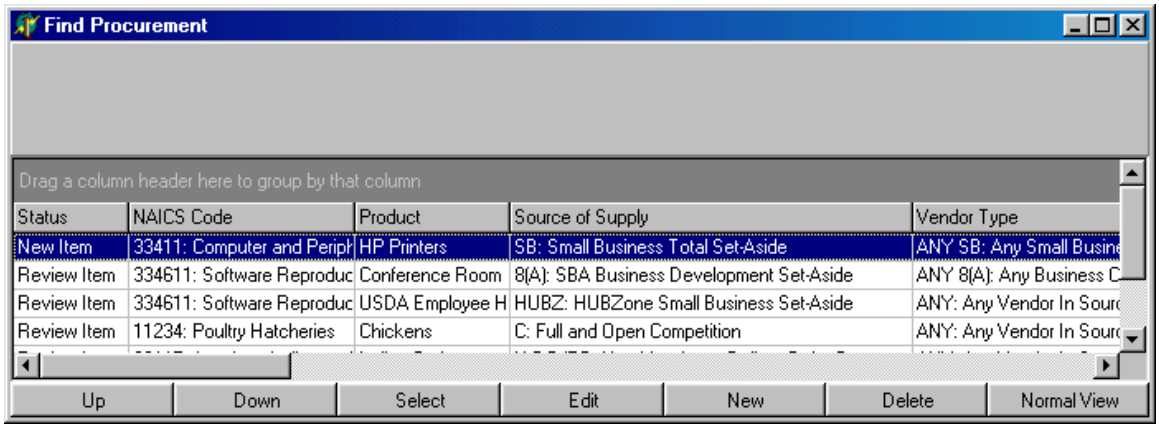


Press "new" to go to a new record with contact information already in it. This is another way you can add procurement records – to your or one of your submitter's forecasts.



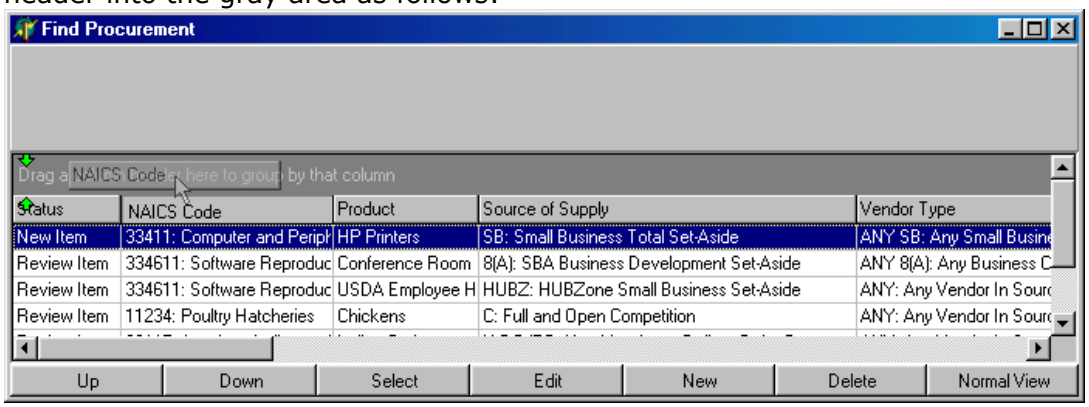
Press "**delete**" to permanently delete this record. You will be prompted to confirm – by all means, press the "cancel" key at the following screen if you <u>didn't</u> mean to delete:

Press " **group view**" if you wish to sort the existing data a different way. When you do this, you get a gray bar across the top of your data that says "drag a column header here to group by that column."

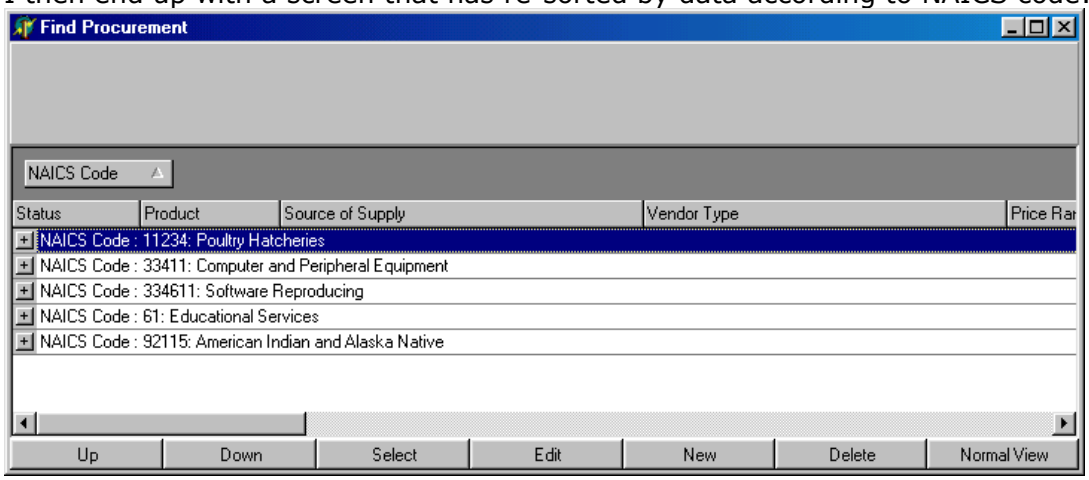


When you do this, you select the data on which you want to sort – whether it be Status, NAICS Code, Product, Source of Supply, Vendor Type, Price Range, Quarter (specific), Quarter Count (all quarters together), city, state, contact, organization, or agency.

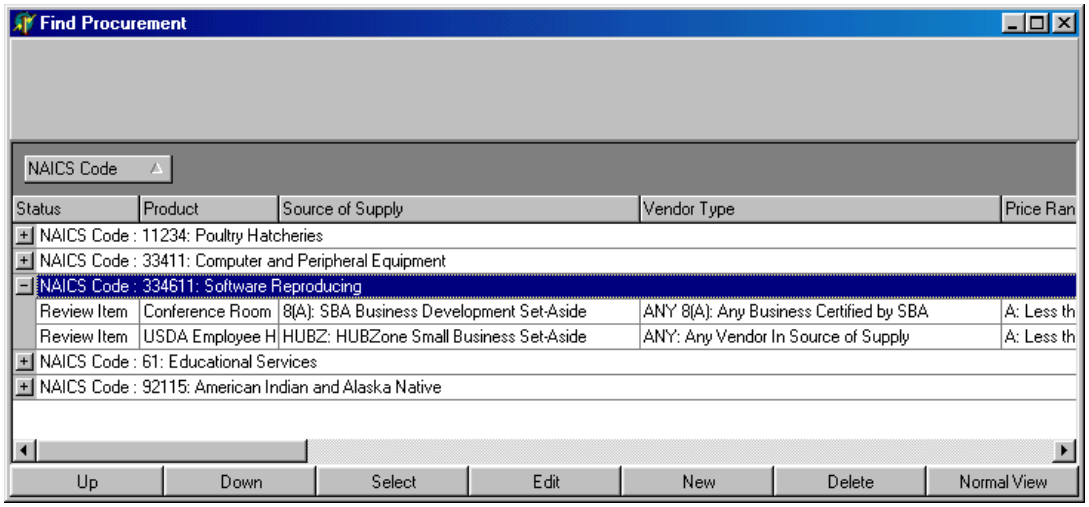
In the following example, I have selected NAICS Code – I drag and drop the column header into the gray area as follows:



I then end up with a screen that has re-sorted by data according to NAICS code:



Press the small + sign to the left of the major colum header to expand the subset of items under that NAICS Code:

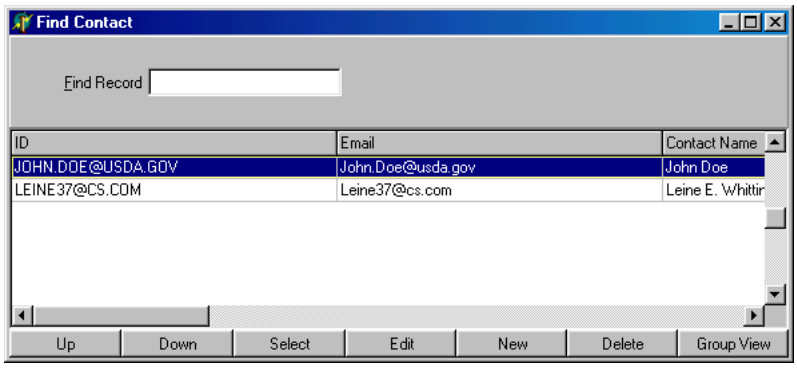


You can sort on any of the column headers.

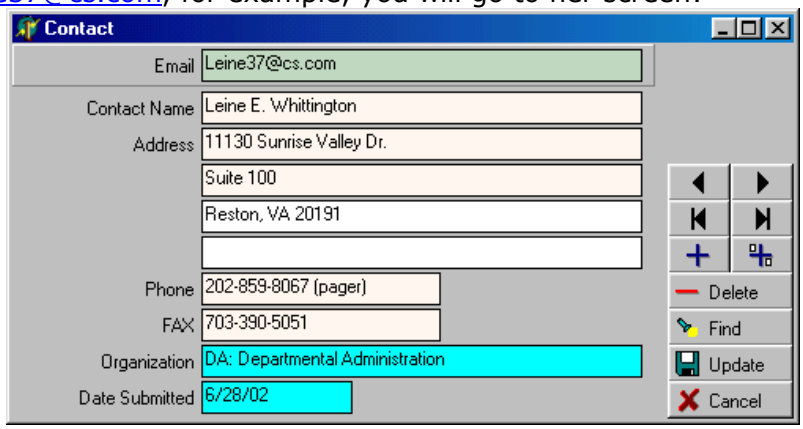
To get out of this mode, press "normal view," double click on the entry you want to view, or close and reopen the program.

17. REVIEWING CONTACTS:

As a reviewer, you will be able to peruse the contact information for not only yourself, but for all the individuals that reported to you. Press the "Review Contacts" button to get to this information.



Enter the individual record by double clicking on an individual entry. If you double click on Leine37@cs.com, for example, you will go to her screen:



18. CORRECTING FORECASTS:

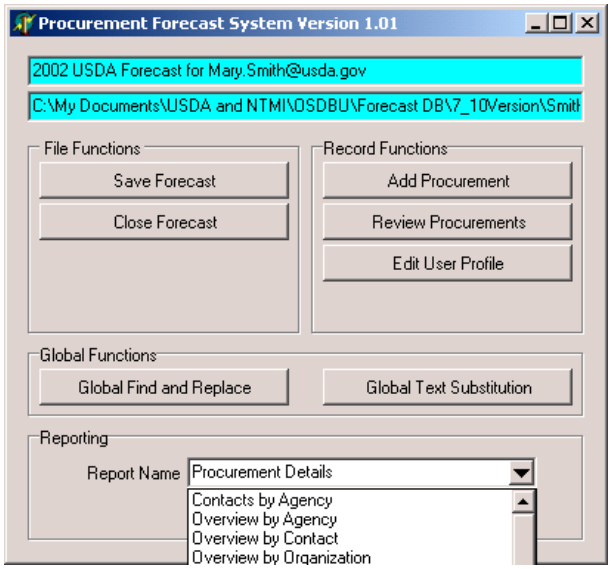
You can correct errors in your own forecast by modifying the individual records. You can also correct other people's forecasts in this way. The advantage of this approach is that you can make quick typographical corrections or Source of Supply corrections without having to return to the submitter. The disadvantage of this approach is that the submitter now retains a copy of an erroneous forecast.

As an option, however, you can request that the submitter redo his/her data and resubmit it to you. As long as their ID (e.g., email address) does not change during the resubmission process, the process of reimporting their data will totally overwrite their old submissions. The advantage of this approach is that the submitter is made aware of the errors (and will be less likely to make them again in the future), and the reviewer now BOTH have a copy of an corrected forecast.

HOWEVER, if you chose this option, you MUST reimport the entire forecast, with the corrections, deletions, additions or modifications included. If someone realizes that they left out 5 forecast items from a 100 item list, and creates another forecast with just these items (and their same contact information), you will overwrite their entire previous submission (of 100) with their new submission (of 5) by importing their information. This is because the program picks up on the fact that it is a redundant POC, interprets the import as a **re**import, and overwrites all their old submissions.

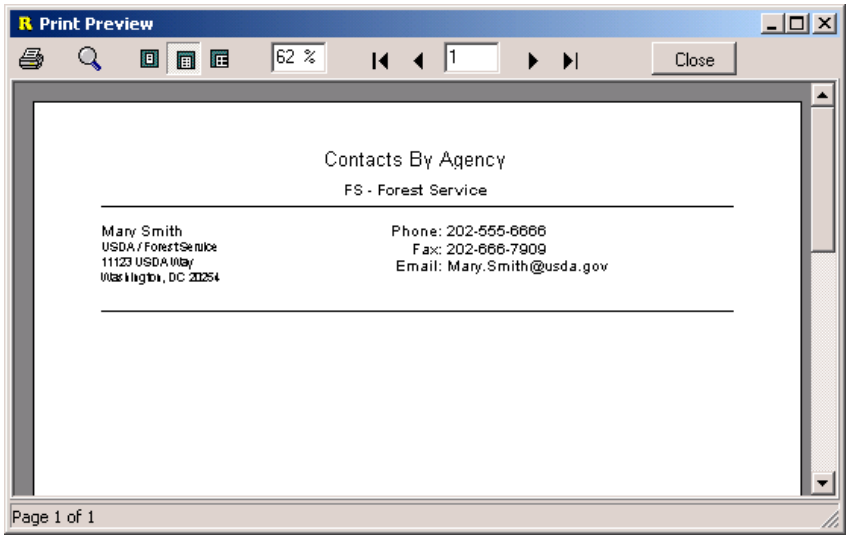
QRG: REPORTS

For either previewing or printing a report – first select the report you wish to preview or print by single clicking the down arrow on the bottom of your main screen and scrolling to the report you wish to preview/print.

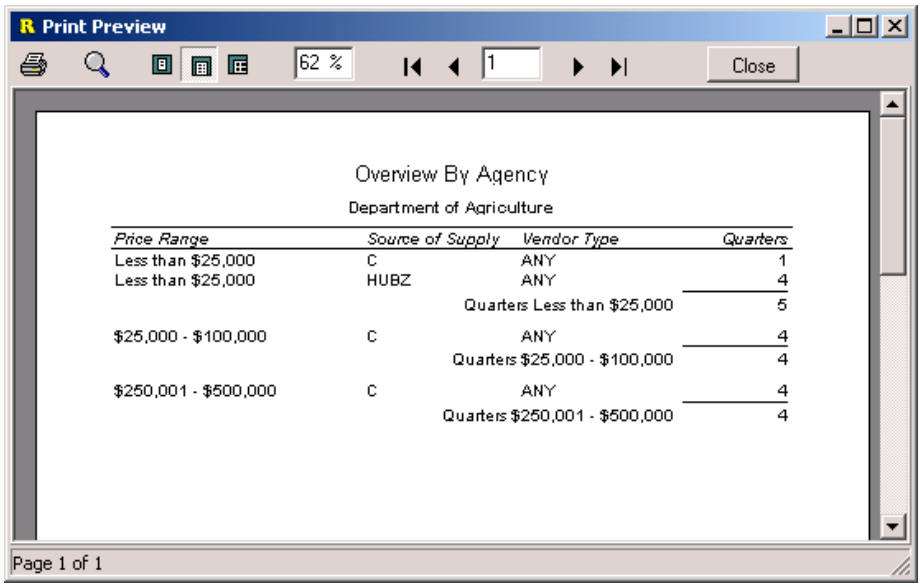


The default report is "Procurement Details" which lists all of the information for every record you have entered.

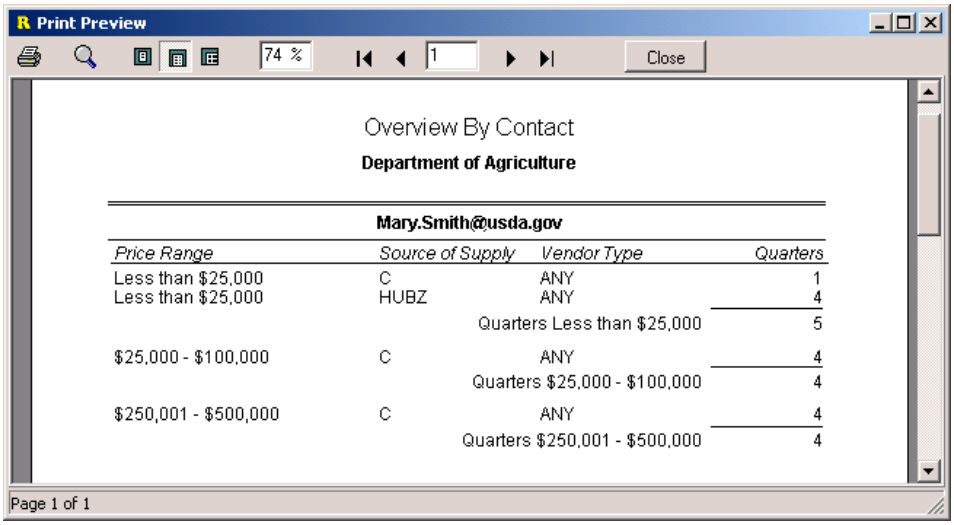
(a) **Contacts by Agency** will give you a report of contact information. For submitters, this report will only contain the contact information for one individual (the submitter). For reviewers, this report will contain the contact information for all submitters as well as the reviewer. This report will look as follows:



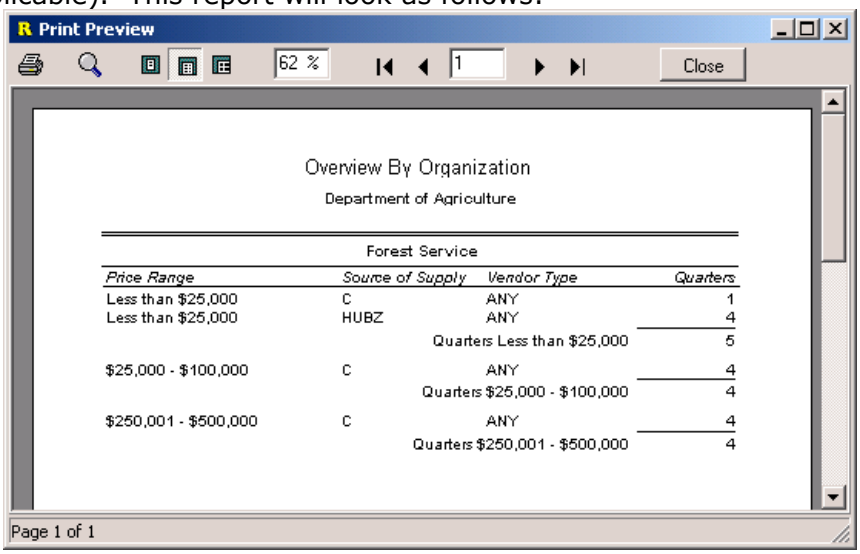
(b) Overview by Agency will give you a report of the different procurements in the different price ranges for the entire Agency (e.g., USDA or your particular Agency if it has not been integrated). For submitters, this report will only contain the forecast records of their own creation (the submitter). For reviewers, this report will contain the forecast information for all submitters as well as the reviewer. This report will look as follows:



(c) Overview by Contact will give you a report summary of all procurement forecast records associated with one particular POC. For submitters, this report will only contain the information for you (the submitter). For reviewers, this report will contain the information for all submitters as well as the your own. This report will look as follows:



(d) Overview by Organization will give you a report summary of all procurement forecast records associated with one particular Organization (sub-agency). For submitters, this report will only contain the information for your organization. For reviewers, this report will contain the information for all organizations that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



Print Preview

Overview By Organization

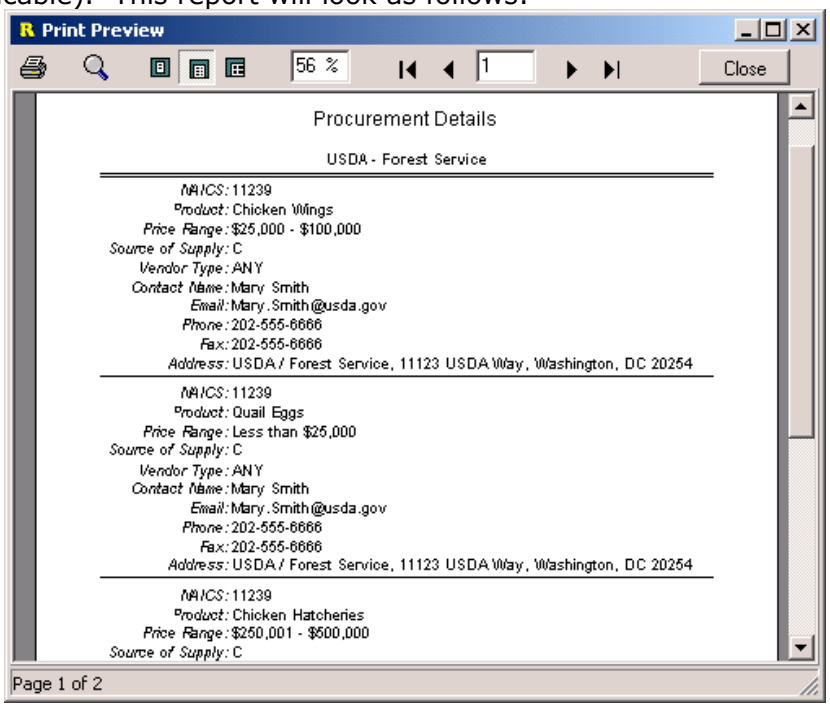
Department of Agriculture

Forest Service

Price Range	Source of Supply	Vendor Type	Quarters
Less than $25,000	C	ANY	1
Less than $25,000	HUBZ	ANY	4
		Quarters Less than $25,000	5
$25,000 - $100,000	C	ANY	4
		Quarters $25,000 - $100,000	4
$250,001 - $500,000	C	ANY	4
		Quarters $250,001 - $500,000	4

Page 1 of 1

(e) Procurement Details will give you all the main details of every entry in your forecast. For submitters, this report will only contain the information for your organization's forecast. For reviewers, this report will contain the information for all organizations that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



Print Preview

Procurement Details

USDA - Forest Service

NAICS: 11239
Product: Chicken Wings
Price Range: $25,000 - $100,000
Source of Supply: C
Vendor Type: ANY
Contact Name: Mary Smith
Email: Mary.Smith@usda.gov
Phone: 202-555-6666
Fax: 202-555-6666
Address: USDA / Forest Service, 11123 USDA Way, Washington, DC 20254

NAICS: 11239
Product: Quail Eggs
Price Range: Less than $25,000
Source of Supply: C
Vendor Type: ANY
Contact Name: Mary Smith
Email: Mary.Smith@usda.gov
Phone: 202-555-6666
Fax: 202-555-6666
Address: USDA / Forest Service, 11123 USDA Way, Washington, DC 20254

NAICS: 11239
Product: Chicken Hatcheries
Price Range: $250,001 - $500,000
Source of Supply: C

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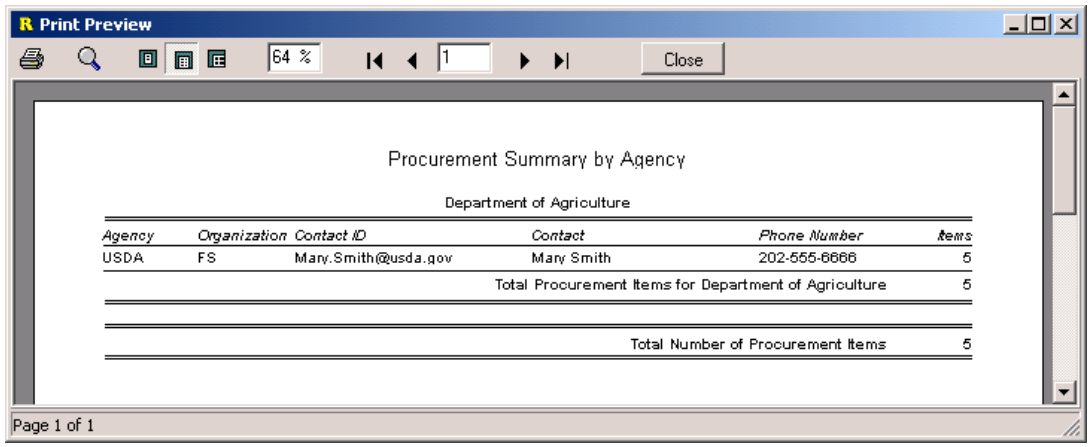
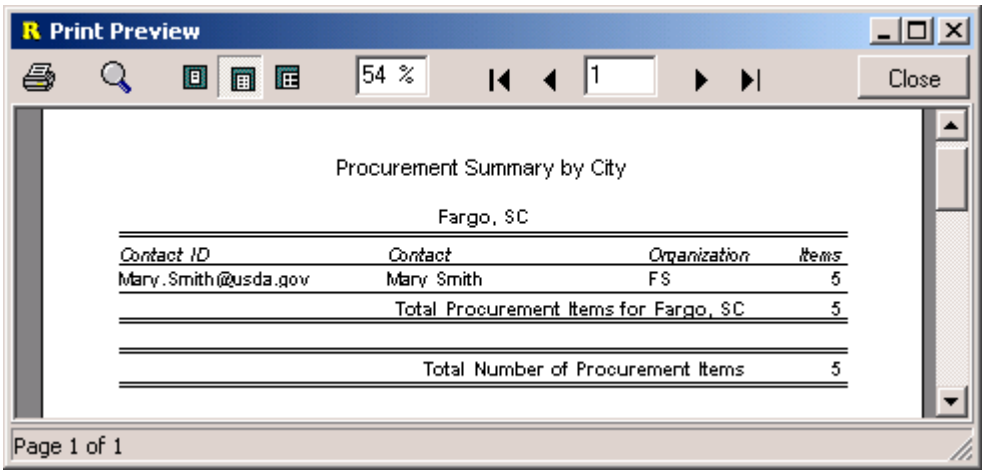
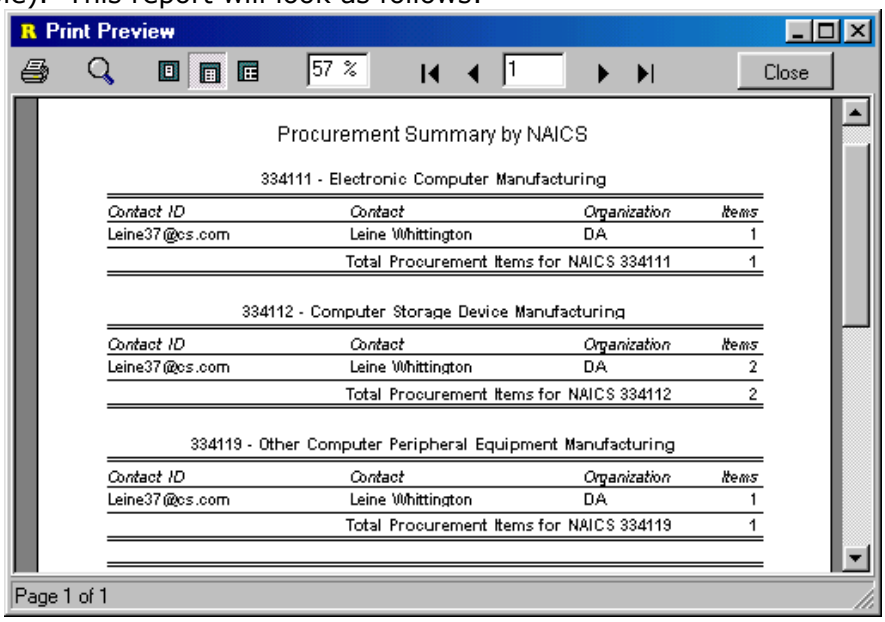
(f) Procurement Summary by Agency will really only be useful to those consolidating the entire forecast. This will give you all the main details of every entry – by point of contact. For submitters, this report will only contain the information for your forecast. For reviewers, this report will contain the information for all POCs that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



(g) Procurement Summary by City will give you all the total number of procurement items broken down by city and by point of contact. For submitters, this report will only contain the information for all cities in which you have stated that supplies will be delivered or services will be rendered. For reviewers, this report will contain the information for all cities in which you <u>and your submitters</u> have stated that supplies will be delivered or services will be rendered. This report will look as follows:



(h) Procurement Summary by NAICS give you summary information of every entry – grouped by NAICS code. For submitters, this report will only contain the information for your forecast. For reviewers, this report will contain the information for all POCs that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



Print Preview

Procurement Summary by NAICS

334111 - Electronic Computer Manufacturing

Contact ID	Contact	Organization	Items
Leine37@cs.com	Leine Whittington	DA	1
	Total Procurement Items for NAICS 334111		1

334112 - Computer Storage Device Manufacturing

Contact ID	Contact	Organization	Items
Leine37@cs.com	Leine Whittington	DA	2
	Total Procurement Items for NAICS 334112		2

334119 - Other Computer Peripheral Equipment Manufacturing

Contact ID	Contact	Organization	Items
Leine37@cs.com	Leine Whittington	DA	1
	Total Procurement Items for NAICS 334119		1

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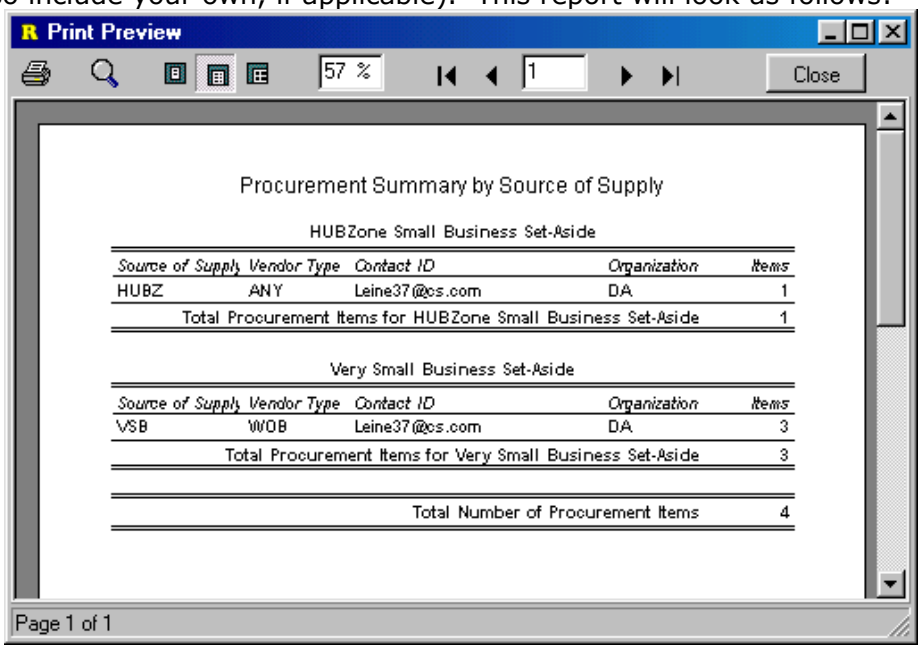
(i) Procurement Summary by Source of Supply will give you summary information of every entry – grouped by Source of Supply. For submitters, this report will only contain the information for your forecast. For reviewers, this report will contain the information for all POCs that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



Print Preview

Procurement Summary by Source of Supply

HUBZone Small Business Set-Aside

Source of Supply	Vendor Type	Contact ID	Organization	Items
HUBZ	ANY	Leine37@cs.com	DA	1
		Total Procurement Items for HUBZone Small Business Set-Aside		1

Very Small Business Set-Aside

Source of Supply	Vendor Type	Contact ID	Organization	Items
VSB	WOB	Leine37@cs.com	DA	3
		Total Procurement Items for Very Small Business Set-Aside		3
		Total Number of Procurement Items		4

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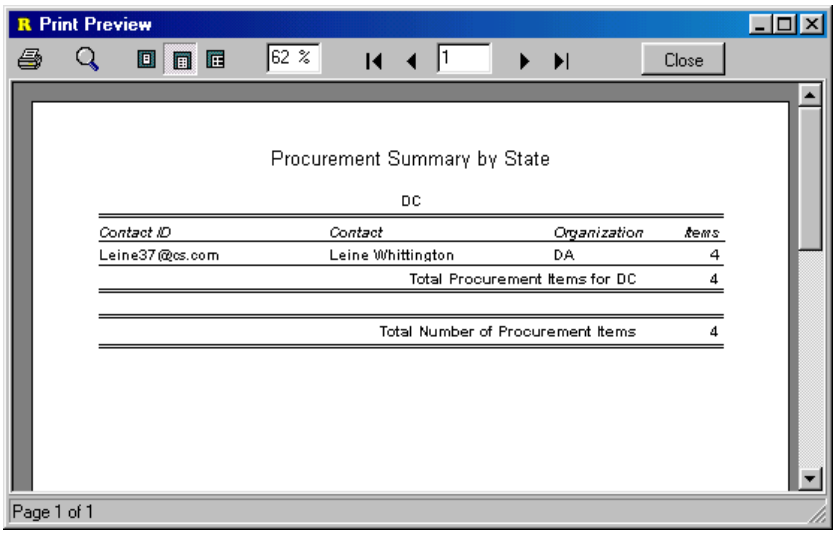
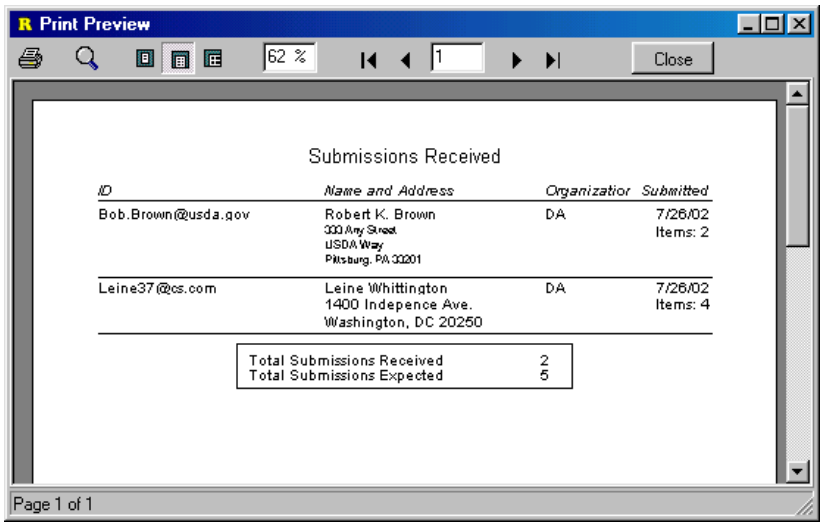
(j) Procurement Summary by State will give you the total number of procurements for each state, grouped by Contact and Organization. For submitters, this report will only contain the information for your forecast. For reviewers, this report will contain the information for all POCs that have been submitting data to you (and it will also include your own, if applicable). This report will look as follows:



k. Submissions Received will really only be useful to those reviewing a number of submissions or those who are consolidating the entire forecast. This will give you all the contact information, organization and address of every individual who has submitted a forecast to you (and whose forecast you have in turn "imported" into your forecast. For submitters, this report will only contain the information for your forecast so is not very useful. For reviewers, this report will indicate how many submissions you have received as well as how many you indicated that you were expecting (when you filled in your initial contact information). This report will look as follows: