B2GNOW

Diversity Management Software

Staff Quick Guide

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System Access

What is my username?

Your username is your email address.

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 your Internet browser.
2. In the **System Access Login** box, enter your username and password.
3. Click **Login**.

How do I change my password?

From the **Edit Settings** menu:
1. 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 **Save**.
5. Your new password is effective immediately.

What do I do if I forget my password?

From the system home page:
1. 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. 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 staff user?

From the **Edit Settings** menu:

1. Click **Add New User.**
2. Fill in each field, clicking **Next** to continue.
3. Mark or unmark the checkbox option to send a password to the user.
4. Click **Save** to complete.

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?

From the **Edit Settings** menu:

1. Click **Your Settings.**
2. Select an option link.
3. Complete your changes.
4. Click **Save** to complete.

How do I edit the settings of other staff users?

From the **Edit Settings** menu:

1. Click **User List**.
2. Click the name of the user you would like to edit.
3. Edit the settings.
4. Click **Save** to complete.

How do I update my organization's information?

From the **Edit Settings** menu:

1. Click **Org Info**.
2. Select a option link.
3. Complete your changes.
4. Click **Save** to complete.

System Support

How do I access the online Help System?

From the **Help & Support** menu:

1. Click **Help System.**

NOTE: The Help System is also available by clicking any of the blue question mark icons throughout the system.

How do I download the Help Guides?

From **Help & Support** menu:

1. Click **Help Guides.**
2. Select the Guide you would like to open.
3. Click the Save Icon in the PDF viewer.

How do I get help from customer/technical support?

From the **Help & Support** menu:

1. Click **Contact Support**.
2. Click on the check box for the recipient.
3. Enter the Subject and your message.
4. Click **Submit**.

How do I report a problem with the system?

From the **Help & Support** menu:

1. Click **Report a Problem**.
2. Enter your problem in the provided fields.
3. Click **Submit**.

NOTE: Attach screenshots, including error messages for clarification.

How can I provide feedback/suggestions?

From the **Tools** menu:

1. Click **Messaging.**
2. Click **Submit Feedback**.
2. Enter your feedback.
3. Click **Submit**.

How can I view the Forums?

From the **Help & Support** menu:

1. Click **Forums.**
2. Click the title of the forum.
3. Click on the title of the topic you would like to view.

NOTE: A yellow arrow indicates new or unread posts.

Vendor Management

How do I search for a Vendor?

From the **Search** menu:

1. Click Vendors.
2. Enter search parameters.
3. Click **Search First 20 Matches**.

How do I verify that a vendor is certified?

From the vendor search results:

1. Click **Certs** in the **Actions** column.

NOTE: If the firm is currently certified, the certification information will be listed in the Current Certifications box.

How do I add a new vendor to the system?

From the **Tools** menu:

1. Click **Add a Vendor.**
2. Fill in the vendor information.

NOTE: The more information you enter, the better your reporting will be.

3. Click **Review** .
4. The system will perform a search to determine if the vendor is already in the system.

   - **Red alert box**: The system found an exact match. The vendor record cannot be saved.
   - **Yellow alert box:** One or more pieces of information matched a vendor already in the system. It may or may not be an exact match. The vendor record may be saved.
   - **No alert box:** The firm does not exist. Create a new vendor account.

NOTE: Depending upon the new firm notification setting, the system may send a username/password notification to their email address and/or fax number.

How do I edit the contact information for a vendor?

From the vendor search results:

1. Click the **Edit** link in the **Actions** column.
2. Click the **General Info** tab.
3. Updated the vendor information.
4. Click **Save Changes**

How do I add authorized users to a vendor account?

From the vendor search results:

1. Click the **Edit** link in the **Actions** column.
2. Click the **Users** tab.
3. Click **Add User**.
4. Enter the user's information and settings.
5. Click **Save** to complete.

How do I edit authorized users to a vendor account?

From the vendor search results:
1. Click the **Edit** link in the **Actions** column.
2. Click the **Users** tab.
3. Click on their name.
4. Update the information.
5. Click **Save** to complete.

Where do I find a list of ALL joint ventures and owners?

From the **Reporting Tools** menu:
1. Click **Run/Queue Report**.
2. Click **View Complete Reports List**.
3. Click **Concessions: Joint Venture Owners**.

Refer to **How do I run a report?** in the General section

NOTE: The report is available only to organizations that use the Concessions module.

Where do I find the owners of a particular joint venture?

From the vendor search results:
1. Click the **Edit** link in the **Actions** column.
2. Click the **Contacts & Owners** tab.
3. View Owners box to see owners currently assigned to this joint venture.

How do I edit joint venture owners to a firm?

From the C**ontacts & Owners** tab:
1. View Owners box to see owners currently assigned to this joint venture.
2. Click **Edit** link in the **Actions** column.
3. Update the information.
4. Click **Save** to complete.

How do I add joint venture owners to a firm?

From the **Contacts & Owners** tab:
1. View Owners box to see owners currently assigned to this joint venture.
2. Click **Add Owner** below the box.
3. Complete the form.
4. Click **Save** to complete.

How can I contact a business through the system?

From the user search results:
1. Click the **Email** link in the **Actions** column.
2. Compose your message in the space provided.
3. Click **Save** to complete.

Contracts

How do I find a specific contract?

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

How do I view a list of my contracts?

From the **Search** menu:
1. Click **Contracts**.
2. In the **Contract Compliance Officer** field, select your name.
3. Click **Search all Matches.**

How do I view a contract?

From the contract search results:
1. Click the contract number or the name of the contract.

How do I add a new subcontractor to a contract?

From the **Contract Management** page:
1. Click the **Subcontractors** tab.
2. Click **Add Subcontractor.**
3. Fill in the form.
4. Click **Review** to verify the information.
5. Click **Save** to complete.

       OR

From the contract search results,
1. Click the **Subs** link in the **Actions** column.
2. Click **Add Subcontractor.**
3. Fill in the form.
4. Click **Review** to verify the information.
5. Click **Save** to complete.

How do I edit a subcontractor of a contract?

From the **Contract Management** page:
1. Click the **Subcontractors** tab.
2. Click **Edit** in the **Action** column for the subcontractor.
3. Edit the necessary information.
4. Click **Review** to verify the information.
5. Click **Save** to complete.

How do I "unlock" a subcontractor that has designated "Final Payment" made?

From the **Contract Management** page:

1. Click the **Subcontractors** tab.
2. Click **Edit** in the **Action** column for the subcontractor.
3. Change **Yes** to **No**, in the **Final Payment Made?** Field.
4. Click **Review** to verify the information.
5. Click **Save** to complete.

How do I view the audit for a particular time period?

From the **Contract Management** page:

1. Click the **Audit List** tab.
2. Click **View Audit** link in the **Actions** column, for the particular time period.

How do I edit/enter a subcontractor payment on a contract for a particular time period?

From an audit for a particular time period, in the **Audit Subcontractor Details** box:

1. Click the **Edit** link in the **This Period** column.
2. Enter the amount paid for the time period.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

How do I bulk enter subcontractor payment data for a particular time period?

From an audit for a particular time period:

1. Click **Submit ALL Incomplete Records**.
2. Enter the amounts in the form.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

How do I view the payment summary for a contract?

From the **Contract Management** page:

1. Click the **Audit Summary** tab.

OR

From the contract search results:

1. Click the **Audit** link in the **Actions column**.

How do I view the prime contractor's payment history for a contract?

There are three ways to access the prime contractor's payment history:

From the **Audit Summary** tab:

1. Click the **Payment History** link.

From an audit for a particular time period:

1. In **Audit Summary**, click the **Payment History** link.

From the **Subcontractors** tab, in the **Prime Contractor** box:

1. Click the **Payments** link in the **Actions** column.

How do I view a subcontractor's payment history for a contract?

There are three ways to access the subcontractor's payment history:

From the **Audit Summary** tab:

1. Click the on the name of the subcontractor.

From an audit for a particular time period:

1. Click the name of the subcontractor in the **Audit Subcontractor Details** box.

From the **Subcontractors** tab:

1. Click the **Payments** link in the **Actions** column for the subcontractor.

How do I view all contracts assigned to a prime contractor or subcontractor?

From the **Search** menu:

1. Click **Vendors**.
2. Enter the name of the firm.
3. Click **Search All Matches.**
4. Click the **Contracts** link in the **Actions** column of the vendor you selected.

How do I post an amendment/change order to the contract?

From the **Contract Management** page:

1. Click the **Amend Contract** link in the **Contract Status & Actions** box.
2. Complete the Amendment information and contract information.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

NOTE: If the contract has subcontracts, you will be required to note any changes to the contracted percentages.

How do I resolve an audit discrepancy?

To access information about the discrepancy, and information provided by the prime and subcontractor

From an audit for the particular time period:

1. Click **Resolve** under the red **Discrepancy** alert in the **Confirmed By Sub** field.
1. Review the information and communicate with the parties to determine and resolve the situation.
2. Click **Resolve Discrepancy** on the **Discrepancy Resolution** page when the final data is available.
3. Enter the **Final Reported Amount.**
4. Click **Review** to verify the information.
5. Click **Save** to complete.

How do I extend the reporting deadline on an audit?

To extend the reporting period for one particular audit:

From an audit for a particular time period:

1. Click **Extend Reporting Deadline By Two Weeks From Today**.

To extend the reporting period for all audits on the contract:

From the **Contract Management** page:

1. Click the **Audit List** tab.
2. Click **Extend Reporting Deadline By Two Weeks From Today** at the bottom of the page.

How do I approve or deny a subcontractor addition request?

From the **Contract Management** page:

1. Click the **Subcontractors** tab.
2. Click the **View** in the **Subcontractor Addition Requests** box at the bottom of the page.
3. Review the request.
4. Click **Approve Request** or **Deny Request** at the bottom of the page.

NOTE: If you are not authorized to take action, your recommendation will be recorded and the request will remain open.

5. Confirm the data.
6.   Save the subcontractor.

   OR

From the **View** menu:

1. Click **Sub Addition Requests**.
2. Click on the Subcontractor name.

How do I close out a contract?

From the **Contract Management** page:

1. Click the **Contract Close** tab.
2. Click **Close Out Contract**.

Concessions

How do I find a specific concession?

From the **Search** menu:
1. Click **Concessions**.
2. Enter the concession number in the first field, or fill in/select other parameters.
3. Click **Search All Matches**.

How do I view a list of my concessions?

From the **Search** menu:
1. Click **Concessions**.
2. In the **Concession Compliance Officer** field, select your name.
3. Click **Search All Matches**.

How do I view a concession?

From the contract search results:
1. Click the contract number or the name of the contract.

How do I add a new location/subtenant to a concession?

From the **Concession Management** page:
1. Click the **Concession Locations** tab.

OR

From the concession search results:
1. Click the **Locations** link in the **Actions** column.
2. Click **Add Location/Subtenant.**
3. Complete the form.
4. Click **Review** to verify the information.
5. Click **Save** to complete.

How do I edit a location/subtenant of a concession?

From the **Concession Management** page:
1. Click the **Concession Locations** tab.
2. Click **Edit** in the **Action** column for the location/subtenant.

OR

From the concession search results:
1. Click the **Locations** link in the **Actions** column.
2. Click **Edit** in the **Action** column for the location/subtenant.

How do I add a new supplier to a concession?

From the **Concession Management** page:

1. Click the **Suppliers** tab.
2. Click **Add Supplier.**
3. Click the **Get Vendor.**
4. Search for the vendor.
5. Click **Select User** in search results.
6. Complete the form.
7. Click **Review** to verify the information.
8. Click **Save** to complete.

OR

From the concession search results:

1. Click the **Suppliers** link in the **Actions** column.
2. Follow steps 2-8 from above.

How do I edit a supplier of a concession?

From the **Concession Management** page:

1. Click the **Concession Locations** tab.
2. Click **Edit** in the **Action** column for the location/subtenant.

OR

From the concession search results:

1. Cick the **Locations** link in the **Actions** column.
2. Click **Edit** in the **Action** column for the location/subtenant.

How do I view the audit for a particular time period?

From the **Concession Management** page:

1. Click the **Audit List** tab.
2. Click **View Audit** link in the **Actions** column for the particular time period.

How do I edit/enter the revenue amount on a concession for a particular time period?

From an audit for a particular time period:

1. click the **Edit** in the **Audit Revenue (Location/Subconcessionaire) Details** box.
2. Enter the amount paid for the time period.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

How do I bulk enter revenue data for a particular time period?

From an audit for a particular time period:

1. Click **Submit ALL Incomplete Location Records** button above the **Audit Revenue (Location/Subconcessionaire) Details** box.
2. Enter the amounts.
3. Click **Review** to verify the information.
4. Click **Save** to complete

How do I edit/enter the expenditure amount on a concession for a particular time period?

From an audit for a particular time period:

1. Click the **Edit** in the **Audit Expenditure (Supplier) Details** box.
2. Enter the amount paid for the time period.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

How do I bulk enter supplier payment data for a particular time period?

From an audit for a particular time period:

1. Click **Submit ALL Incomplete Location Records.**
2. Enter the payment information.
3. Click **Review** to verify the information.
4. Click **Save** to complete.

How do I view the revenue and/or payment summary for a concession?

From the **Concession Management** page:

1. Click the **Audit Summary** tab.

OR

From the concession search results:

1. Click the **Audit** link in the **Actions column**.

How do I view a location's revenue history for a concession?

There are three ways to access a location's revenue history.

From the **Audit Summary** tab:

1. Click the name of the Location/Subtenant.

From an audit for a particular time period:

1. Click the name of the Location/Subtenant in the **Audit Revenue (Location/Subconcessionaire) Details** box.

From the **Locations** tab:

1. Click the **Revenues** in the **Actions** column for the Location/Subtenant.

How do I view a supplier's payment history for a concession?

There are three ways to access a supplier's payment history.

From the **Audit Summary** tab:

1. Click the name of the Location/Subtenant.

From an audit for a particular time period:

1. Click the name of the Location/Subtenant in the **Audit Expenditure (Supplier) Details** box.

From the **Suppliers** tab:

1. Click the **Payments** link in the **Actions** column for the Location/Subtenant.

How do I view all concessions assigned to a concessionaire, subtenant, joint venture partner, or supplier?

From the **Search** menu:

1. Click **Vendors**.
2. Enter the name of the vendor.
3. Click **Search.**
4. Click the **Concessions** link in the **Actions** column.

How do I close out a concession?

From the **Concession Management** page:

1. Click the **Concession Close** tab.
2. Click **Close Out Concession**.

Outreach

How do I create a new Outreach Project?

From the **Create** menu:

1. Click **New Project.**
2. Fill out Outreach Project Parameters.
3. Click **Create Project.**
4. Click **Okay** on the pop-up alert to continue.

How do I configure my project settings?

From the **Outreach Project Management** page:

1. Click the **Settings** tab.
2. Select your settings.
3. Click **Save** to complete.

How do I create or edit the content of my project?

From the **Outreach Project Management** page:

1. Click the **Content** tab.
2. Click **Edit.**
3. Enter or edit your text in each section.
4. Click **Save** to complete.

TIP: Use the Spell Check button to double check your content.

How do I add vendors to my vendor list?

From the **Outreach Project Management** page:

1. Click the **Vendor List** tab.
2. Click on Add Vendors.
3. Fill in your search parameters.
4. Click on **Search All Matches**.

From the search results:

5. Click **Add to Outreach.**
6. Select your project and click **Add Vendors to Project.**
7. Repeats step 2-5 to add more vendors.
8. Use the checkboxes to select the vendors you do not want to include.
9. Click **Delete** at the top of the column.

How do I view my projects?

From the **View** menu:

1. Click **Outreach Projects**
2. Click on the title to view

General

How do I send a message to another user?

From the **Message** menu:

1. Click **Send a Message**.
2. Enter your message
3. Click **Review** to verify your message.
4. Click **Send** to complete

NOTE: 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 search for other users?

From the **Search** menu:

1. Click **Users.**
2. Enter search parameters.
3. Click **Search**.

NOTE: If no matches were returned, you can modify the search by clicking **Search Again**.

How do I run a report?

To queue a report to run

From the **Reporting Tools** menu:

1. Click **Run/Queue Report**.
2. Click the title of the report you would like to run.
3. Select the desired parameters.
4. Click **Run Report**.

Viewing a report

From the **Reporting Tools** menu:

1. Click **View Report Output**.
2. Click the **Ready to View** link in the Status column for the report you want to view.

NOTE: If the Status indicates **Pending**, it is not ready for viewing.

3. Select a **Report Output Format.**
4. 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).

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

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.

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. Vendors can view only select information on contracts, concessions, and certifications.