

# RFPManager User Help for Managers/Directors

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## RFP Lifecycle

The RFP Lifecycle consists of the following stages:

- Create New Funding Opportunity "Event" in RFPManager
- Edit Settings for New Funding Opportunity "Event"
- Publish "Event"
- After SOI's have been submitted, initiate SOI review event
- Assign SOI reviewers to SOIs
- After SOI reviews, accept/reject of SOIs
- After proposals have been submitted, initiate proposal review event
- Assign reviewers to proposals
- After proposal reviews, accept/reject proposals
- Send Accepted projects to ScienceBase

## Navigating the RFPManager System

- Go to: <https://my.usgs.gov/lccRfpManager/>
- Click **Login** in the upper right corner of the screen
  - For DOI users, log in with your Active Directory login information
  - For non-DOI users, log in using your myUSGS username and password
- To create a new Funding Opportunity click [Create a new Funding Opportunity](#)
- To view or edit a funding opportunity, or to review an upcoming event, click on [Proceed to the Funding Opportunity list](#)

## Create a New Funding Opportunity

- To create a new Funding Opportunity click [Create a new Funding Opportunity](#)
- Enter the details of your event
  - **Organization:** Choose a funding organization from the drop-down
  - Choose a **Name** for the Funding Opportunity, something similar to: 'Topic' Funding Opportunity 2017
  - **Proposal Review Only: Check this box if you are not accepting SOIs and applicants will only be submitting proposals.**
  - **Event Dates:** The full time-period for the entire funding opportunity (SOI submissions to announcement of funding) – these dates will remain the same throughout the RFP process. Start should be a date on or before the release of the RFP solicitation/announcement and End should be a date after full proposers are notified of intent to award).
  - **SOI Submission Period:** These dates should reflect the time period for which applicants are able to register and submit an SOI into RFPManager. Start should be the opening date of the RFP (probably the date of the release of the RFP solicitation/announcement) and End should be the deadline date for SOIs.
  - **Proposal Submission Period:** These dates should reflect the time period for which applicants are able to submit a full proposal into RFPManager. Start should be the date that full proposals are requested from accepted SOI applicants and End should be the deadline date for proposals.
  - **Extended DMP Edition Period:** This date can be set to the same date as the Proposal Submission Period End Date. This date is used if needed for additional time for the applicant to edit their DMP, and can be edited at a later date in the RFP process.
  - Add a **Description** of the funding opportunity in the text box
  - Attach any related documents by using the **Upload file** button at the bottom left of the text box
  - Click **Create** at the bottom left to complete your funding opportunity
- After you have created the funding opportunity, click **Settings** in the bottom navigation bar.
  - **Submissions** = Select what type of submission you want registrants to provide. For normal RFP events, leave "Statement of Interest", "Proposal", "Budget", and "Data Management Plan Forms" checked. Click on **Update Submissions** after making your selection.

- [Customize Submissions](#) = Click on each option to configure the questions applicants must respond to during each phase of the RFP. In general, you will only need to edit the "Registration" fields for any custom questions that you'd like to ask registrants.
- [Custom Forms](#) = Edit the SOI and Proposal Review templates. Always check and edit these templates before a review period to make sure review criteria and weightings are correct!  
**NOTE: The review templates cannot be changed once the Review Event has started!**
- [E-Mail Notifications](#) = Check or uncheck the boxes based on what notifications you would like for managers and registrants to receive. This is based on the Director's preference. Click on **Update Confirmation E-Mails** after making your selection.
- [Default Texts](#) = Edit the default email text messages that will go out to applicants during SOI and Proposal accept/reject periods. Always check/edit these default messages before accepting/rejecting an SOI or proposal!
- [Banner Image](#) = Upload a banner image to show up at the top of your Funding Opportunity page in RFPManager. This is optional.
- [Event Owner](#) = The event owner should be the Director/Science Coordinator.
- [Permissions](#) = Edit permissions if you want to add/remove managers or readers of your funding opportunity.
- [Reviewers](#) = Manage your reviewer list or add a new reviewer. Click on the "Reviewer Name" for a reviewer to edit their information or to make them "available" or "unavailable" for a particular funding opportunity. To add reviewers to the Reviewer Pool, click Manage Reviewers and Add New Reviewer, complete the form and select Create.  
*When finished editing the settings, click **Back** at the bottom left corner of the page to return to your main Funding Opportunity page.*

After you have created and configured the Funding Opportunity, click "Publish" to make it available to applicants.

The Funding Opportunity will not be accessible to applicants until you click "Publish."

- Use the Friendly URL in announcements.
- To make any edits to the Funding Opportunity, click **Edit** at the bottom of the page.

## Edit the Review Criteria for SOIs or Proposals/Settings

- Click on **Proceed to the Funding Opportunity list**
- In the **Name** column, click on the name of your event
- When your event page comes up click **Settings** at the bottom of the page
- On the **Settings** page click on the **SOI Review Template** or **Proposal Review Template** and edit the form.  
**Note: You cannot edit the Review Templates once the Review Event has been started.**
- Be sure to click **Update** if needed in the box you are editing

## Initiate the Review Process

- Log in

Make sure you have made any necessary changes to the weights and criteria for the review by editing the "Custom Forms" BEFORE initiating the review process.

- Make sure you do not initiate the review event until AFTER the SOI or Proposal submission period has CLOSED!
- Click on [Proceed to the Funding Opportunity list](#)
- Navigate to your funding opportunity
- Click **Applications** at the bottom of the page
- Click **Initiate SOI Reviews** or **Initiate Proposal Reviews** depending on which stage of the process you are in
- After clicking the Initiate button, you will be taken to the Review Event
- Edit the information as necessary
- Make sure to edit **Submission Dates** to reflect the time period that you want reviewers to be able to access the SOIs or proposals
- Click **Update** when finished

## Edit Reviewer List

- To edit the **Reviewer List** or add a reviewer to the list, click on **Settings** on the Review Event Page
- Then, click on **Manage Reviewers** under the "Reviewers" box on the right
- To edit a reviewer, click on the Id # to the left of a reviewer's name, and then click **Edit**
- Edit any fields needed, then click **Update**
- To add a new reviewer, click on **Add New Reviewer** at top of page just below the title
- Add all of the new reviewer's information, then click **Create**

**Note:** It is recommended that you do not delete reviewers from the list! To remove a reviewer from the reviewer list, do not delete, but instead make them unavailable.

- To do this, click the **ID** number left of the reviewer
- Click **Edit**
- In the reviewer edit screen un-check the box beside "Available"
- Click **Update** to save any changes

## Assign Reviewers

To assign reviews to SOIs or Proposals, go into the Review Event, and Click **Assign Reviews**.

**Note:** The Review event is under the Open Review Events.

## Accept/Reject Process for SOIs and Proposals

- Log in
- Click on [Proceed to the Funding Opportunity list](#)
- Navigate to your funding opportunity

**Make sure the Submission Period for the Review Process has closed before you send any acceptance/rejection notices - this will prevent reviewers from altering their review documents after you send your accept/reject notifications**

- If you need to edit the "Submission Dates" - click on **Edit** at the bottom of the event page; change the "End" date for the submission period to the current date and time

**Note:** After you have changed the date, click **Update** at the bottom of the page. **DO NOT CLICK DELETE!**

- Make sure you are in the Funding Opportunity event on the Review page; it will say "**SOI Reviews**" or "**Proposal Reviews**" at the top of the page after the title of the event
- If you are completing these steps for the **SOI stage**, make sure the **Submission Dates** for the funding opportunity are correct! The email generated by RFP Manager for Accepted SOIs will automatically include the Due Date for proposals based on the End Date for the Proposal Submission Period.
- If you need to change the dates, click **Update** to save

**Note:** After you have changed the date, click **Update** at the bottom of the page. **DO NOT CLICK DELETE!**

**To accept or reject SOIs or proposals:**

- Go into the Funding Opportunity you setup
- Click on **Applications**
- Click **Accept** or **Reject** beside each SOI or proposal you are reviewing

**Be sure you accept/reject proposals under the Proposal section and SOIs under the SOI section.**

- Edit/Send the Accept/Reject Email. (it is not necessary that you send the email at this point, but you have the option). Click on the back button if you do not wish to send an email message. Choose **Send** to send the email.
- Email Changes can be made on the "Settings" Page located in the Default Text Box. Click on the appropriate email message you wish to edit.

## Helpful Reports for Managers

- Go into the Funding Opportunity page (Click on **Funding Opportunity List** in the menu bar at the top of the page)
- *Make sure you are logged in!*
- Click on the name of your event in the list
- Click on **Reports**
- You will be taken to a list of Reports for the funding opportunity, a description of the reports is below

<b>Applications</b>	Lists submission title, applicant information, submitted documents, application stage/status, total review score, Accept/Reject buttons. <ul style="list-style-type: none"> <li>• <i>This is the page where you initiate an SOI or Proposal Review and Accept or Reject an application.</i></li> <li>• You can also use this page to Email all registrants, but clicking <b>Email Registrants</b> at the bottom of the page.</li> </ul>
<b>Master Report</b>	Lists submission title, applicant information, all submitted documents, project summary, budget information, and review information [Master Report for All General Information!]
<b>Applicant List</b>	Lists all applicants including name, email, organization, submission title and Co-PIs
<b>Detailed Applicant List</b>	Contents of Applicant List plus additional contact information, project summary, and responses to registration questions
<b>Document List</b>	Location for all documents, categorized by type of document (SOI, Proposal, Budget, etc.). This page allows you to download all documents (SOIs or Proposals) with one click.
<b>Data Management Plan List</b>	Lists data management plan records and comments from the data stewards for all submissions
<b>Budget Report</b>	Lists budget numbers and information for all submissions. The Budget Report will only be populated if you are using the supported budget template.
<b>Go to SOI Review Reports</b>	Takes you to the Reports for SOI Review information
<b>Go to Proposal Review Reports</b>	Takes you to the Reports for Proposal Review information
<b>Full Document List</b>	Lists applicant, submission title, application stage, review score, and documents for ALL SOIs (by Category.)

- To view the reports for SOI or Proposal Review information, click on **Go to SOI Review Reports** or **Go to Proposal Review Reports**.

<b>Reviewer Assignments</b>	Check to see which SOI / proposal a reviewer is assigned to AND assign reviewers to an SOI / proposal
<b>Reviewer List</b>	Lists the reviewers (name, title, email, organization). Allows you to click on a reviewer to see which applications he/she has been assigned to
<b>Detailed Reviewer List</b>	Lists the reviewers with name, email, organization, title, address, phone
<b>Reviews Report</b>	Lists the SOI/Proposal title, the review status of the application, and the review scores for the application, categorized by criteria. [Click on Extended Report in the upper right corner to show the breakdown of scores based on reviewer. Then click on Expand Comments to see all review comments for the submissions]
<b>Show Reviews</b>	Shows the list of all applications under review (Click on a title to see all of the reviewers for that submission and see all of the combined scores/comments)
<b>Show Reviewers</b>	Shows the list of all reviewers (Click on a reviewer to see all SOIs/Proposals under review by that reviewer and the scores for each document)

## Helpful Tips for Managers

### Filtering Email Notifications in BisonConnect

This option is found on the **Settings** page of the Funding Opportunity.

Managers have the option to receive email notifications when new applicants register in the RFP system or when they upload new documents. If you do not want to disable email notifications, but also do not want them to clutter your email inbox, you can filter them. All notifications come from [rfp@usgs.gov](mailto:rfp@usgs.gov) and have a "RFP" tag in the subject line.

To filter the notifications in BisonConnect:

1. Create a label (for instance, a "notifications" sub-label of the "rfp" label)
2. Select one of the RFP Manager email notifications from the Inbox
3. Click the **Filter messages like these** item in the **More** drop down menu
4. Click **Create filter with this search** link
5. Check:
  - Skip the Inbox (Archive it)
  - Apply the label (Choose label created at step 1)
  - Never mark it as important
  - Also apply filter to X matching conversations
6. Click **Create filter** button

## How to Email Registrants Using the Applications Report

- The **Email Registrants** feature is available at any time during the RFP process and can be used to send additional emails to registrants as needed
- Select the **Applications** report and scroll to the bottom of the page
- After scrolling to the bottom of the page, select the Email Registrants link from the menu bar

On the next page you can type a customized message. An email can be sent to all of the registrants by selecting the check box next to the All Confirmed Attendees or All Unconfirmed Attendees text.

- Registrants can also be emailed separately by checking the box next to the registrant's name(s)
- After the appropriate boxes have been checked, select the Send Email link at the bottom of the page

## How to Download Documents Using the Document List Report

To download a zip file containing all of the documents submitted to funding opportunity or to download a zip file containing just the SOI documents, select the **Document List** report.

- On the following page select the download option that is needed.

### **Download All Documents (ZIP)**

This will download all documents (as a zip file) that have been uploaded to a funding opportunity

### **Download All Documents (flat ZIP)**

Download all documents to a single file

### **Download All SOIs (ZIP)**

This will download only SOI files

### **Download Document Metadata (PDF)**

This will download the information (names, emails etc.) (as a PDF) for each submissions and display which documents have been submitted

## How to View a Reviewer's Dashboard Using the Reviewer Assignments Report

To check on the status of a reviewer's progress in regards to reviewing SOIs that they have been assigned

- Select the Reviewer Assignments on the reports page.
- Select the blue Confirmed or Unconfirmed text located below a reviewer's name
- On the following page, select the reviewer's registration dashboard link

This is the reviewer's dashboard. Below the **Contact Information** box is the list of assigned reviews. The text at the beginning of each bulleted item is the status of the review.