



2019 User Conference

INFORM. EDUCATE. INSPIRE

Proposal Reporting



Richard Whiteoak

Technical Support Manager
Privia

Privia Reporting Engine

- Brief Overview
- Review Permissions
- Report Types
- Live Demo
- Refine & Target

Modify Report

Save & Run Report Cancel

Type: Activities

Name: Activity by State

Visibility: ☒ Everyone can see this report. ☐ Only I can see this report.

☐ Include wrapper activities

Columns

Select which columns you would like the report to have.

Available columns:

- (Privia ID
- Acceptor - Address
- Acceptor - Business Phone
- Acceptor - Cell Phone
- Acceptor - dType
- Acceptor - Email
- Acceptor - Fax
- Acceptor - First Name
- Acceptor - Home Phone
- Acceptor - Last Name
- Acceptor - Login Name
- Acceptor - Name
- Acceptor - Organization
- Acceptor - Status
- Acceptor - Title

Selected columns: [9]

- Title
- Status
- Activity Name
- Accountable - Name
- State
- Days Overdue
- Is Archived
- Is Milestone
- Finish Date

Filter

Filters allow you to pre-determine records displayed based on specific values in selected fields. Click on Add to select fields and values. (Max. Limit of 30 Filters)

Remove State is equal to In Progress

Dynamic Filter

Dynamic Filters allow you to restrict records displayed by specifying values during reporting time. Click on Add to select fields by which you want to restrict records. (Max. Limit of 30 Filters)

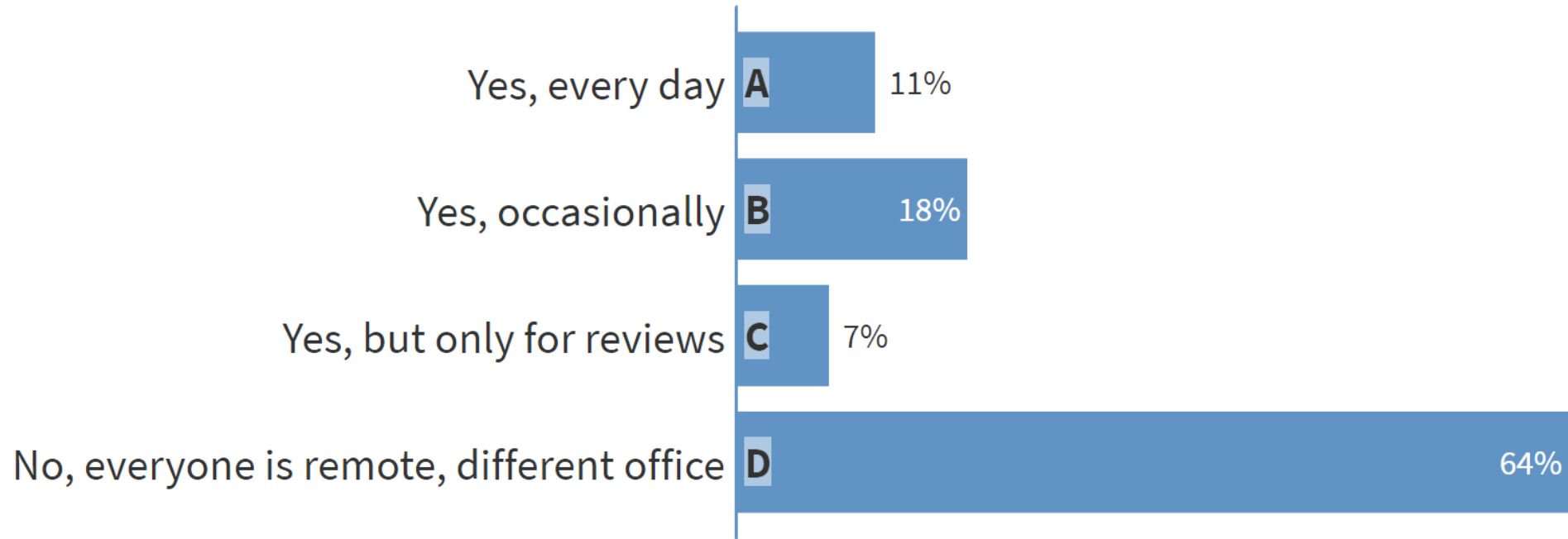
Remove Account - Account Name is equal to

Remove Status is equal to

Report Results

| Title | Status | Accountable | Activity Name | Days Overdue | Is Archived | Is Milestone | Finish Date |
|--|---------|-------------|---|--------------------------|-------------|--------------|-------------|
| Airborne Anti-Submarine Warfare (ASW) Systems Engineering Support | | Ad | | | | | 6 |
| B2 | Overdue | Ad | | | | | 5 |
| Department of Labor (DOL) Human Resources Center (HRC) Leadership Training | Normal | Pr | | | | | 1 |
| | Overdue | | Add Graphic 2 | | | In Progress | 34 |
| | Overdue | | RFP Analysis | Mouse, Mighty | | In Progress | 229 |
| Dickenson Mobile Generators | | | | | | | 6 |
| | Overdue | | Final Bid/No Bid Review & Decision | Privia - McConville, Jay | | In Progress | 6 |
| ENTERPRISE STORAGE SERVICES-(Source: Deltek) | | | | | | | 77 |
| | Overdue | | Understand Key Decision Makers and Stakeholders | Privia - Maxwell, Nikole | | In Progress | 77 |
| | Overdue | | Understand Customer Requirements | Privia - Maxwell, Nikole | | In Progress | 77 |
| | Overdue | | Build/Extend Relationship with Customer | Privia - Maxwell, Nikole | | In Progress | 77 |
| | Overdue | | Understand Customer | Privia - Maxwell, Nikole | | In Progress | 77 |

Do you see the people you write proposals with?



How Do You Know?



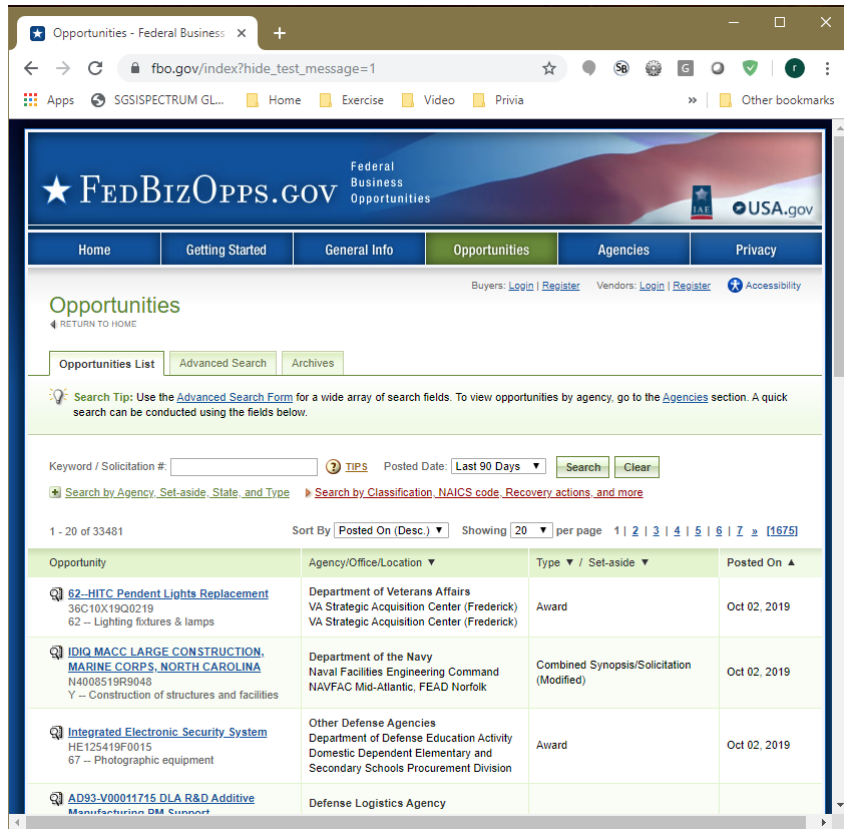
- Email?
 - Phone Calls?
 - Walk the Halls?
 - Meetings?
- Activity Reports

Privia Overview

- Capture Opportunity Data
- Assign Tasks/Activities with a repeatable process
- Collaborate
- Produce Response
- Submit
- Repeat



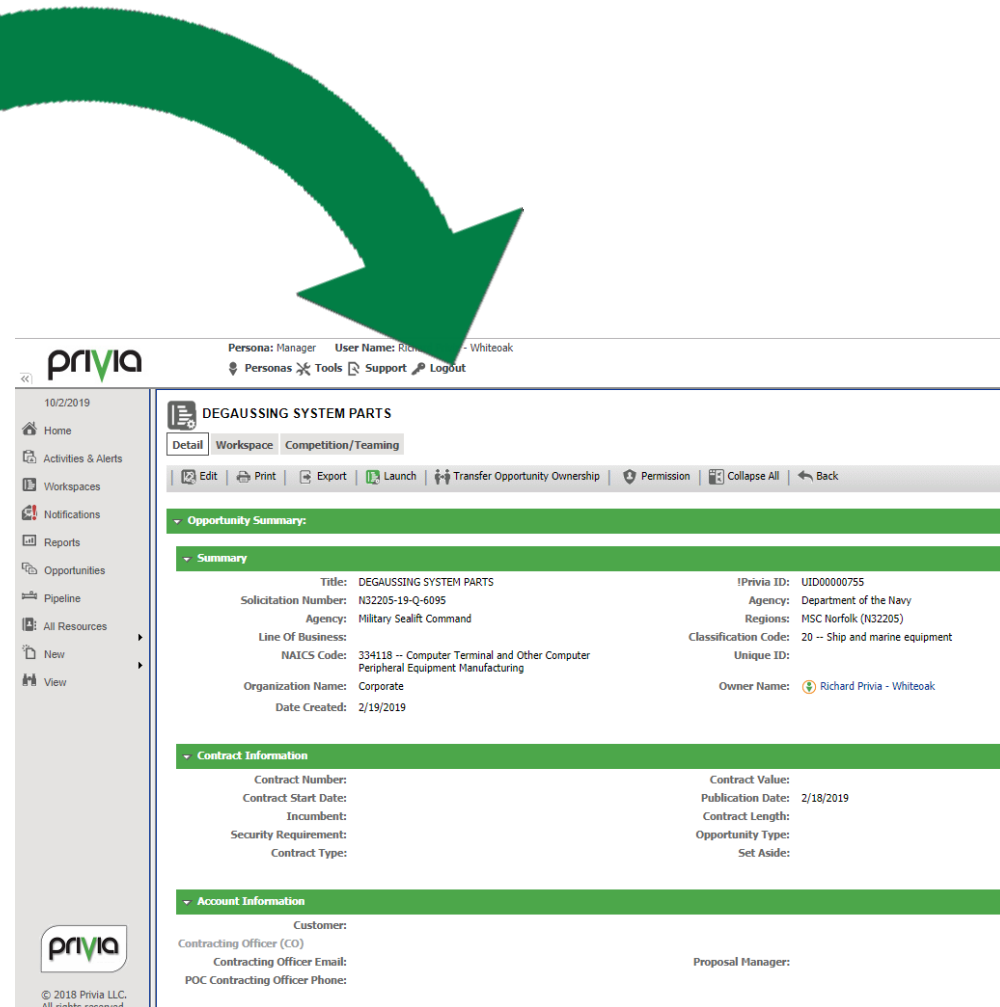
Privia Overview - Capture



The screenshot shows the FBO website interface. The top navigation bar includes links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy. The main content area displays a list of opportunities with columns for Opportunity, Agency/Office/Location, Type / Set-aside, and Posted On. A large green arrow points from the 'Opportunities' section of the FBO website to the Privia interface on the right.

| Opportunity | Agency/Office/Location | Type / Set-aside | Posted On |
|---|--|---|--------------|
| 62-HITC Pendent Lights Replacement 36C10X19Q0219 62 -- Lighting fixtures & lamps | Department of Veterans Affairs VA Strategic Acquisition Center (Frederick) VA Strategic Acquisition Center (Frederick) | Award | Oct 02, 2019 |
| IDIO MACC LARGE CONSTRUCTION MARINE CORPS, NORTH CAROLINA N4008519R0048 Y -- Construction of structures and facilities | Department of the Navy Naval Facilities Engineering Command NAVFAC Mid-Atlantic, FEAD Norfolk | Combined Synopsis/Solicitation (Modified) | Oct 02, 2019 |
| Integrated Electronic Security System HE125419F0015 67 -- Photographic equipment | Other Defense Agencies Department of Defense Education Activity Domestic Dependent Elementary and Secondary Schools Procurement Division | Award | Oct 02, 2019 |
| AD93-V00911715 DLA R&D Additive Manufacturing DM Support | Defense Logistics Agency | | |

FBO, GovWin, Salesforce, SugarCRM



The screenshot shows the Privia interface. The top navigation bar includes links for Home, Activities & Alerts, Workspaces, Notifications, Reports, Opportunities, Pipeline, All Resources, New, and View. The main content area displays details for a specific opportunity, including a summary, contract information, and account information. A large green arrow points from the 'Opportunities' section of the FBO website to the Privia interface.

DEGAUSSING SYSTEM PARTS

Summary

| | |
|---|--|
| Title: DEGAUSSING SYSTEM PARTS | Privia ID: UID00000755 |
| Solicitation Number: N32205-19-Q-6095 | Agency: Department of the Navy |
| Agency: Military Sealift Command | Regions: MSC Norfolk (N32205) |
| Line Of Business: NAICS Code: 334118 -- Computer Terminal and Other Computer Peripheral Equipment Manufacturing | Classification Code: 20 -- Ship and marine equipment |
| Organization Name: Corporate | Unique ID: |
| Date Created: 2/19/2019 | Owner Name: Richard Privia - Whiteoak |

Contract Information

| | |
|-----------------------|-----------------------------|
| Contract Number: | Contract Value: |
| Contract Start Date: | Publication Date: 2/18/2019 |
| Incumbent: | Contract Length: |
| Security Requirement: | Opportunity Type: |
| Contract Type: | Set Aside: |

Account Information

| | |
|--------------------------------|----------------------------|
| Customer: | Proposing Officer (CO): |
| Contracting Officer (CO): | Contracting Officer Email: |
| POC Contracting Officer Phone: | Proposal Manager: |

Privia Overview - Capture

10/2/2019

Home

Activities & Alerts

Workspaces

Notifications

Reports

Opportunities

Pipeline

All Resources

New

View

privia

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Persona: Manager User Name: Richard Privia - Whiteoak

Personas Tools Support Logout

DEGAUSSING SYSTEM PARTS

Detail Workspace Competition/Teaming

Edit Print Export Launch Transfer Opportunity Ownership Permission Collapse All Back

Opportunity Summary:

Summary

| | | | |
|----------------------|---|----------------------|---------------------------------|
| Title: | DEGAUSSING SYSTEM PARTS | !Privia ID: | UID00000755 |
| Solicitation Number: | N32205-19-Q-6095 | Agency: | Department of the Navy |
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| Line Of Business: | | Classification Code: | 20 -- Ship and marine equipment |
| NAICS Code: | 334118 -- Computer Terminal and Other Computer Peripheral Equipment Manufacturing | Unique ID: | |
| Organization Name: | Corporate | Owner Name: | Richard Privia - Whiteoak |
| Date Created: | 2/19/2019 | | |

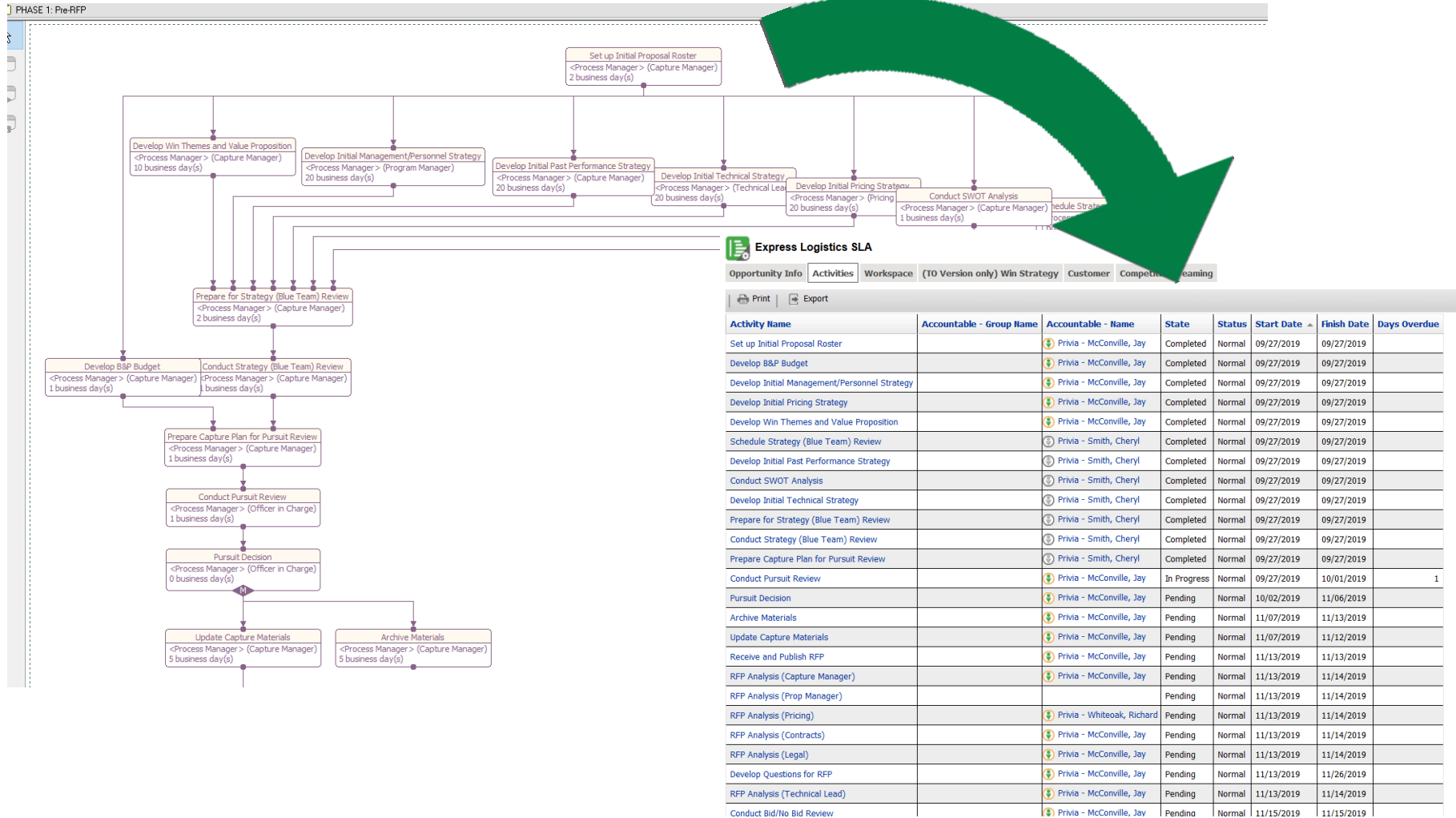
Contract Information

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|-----------------------|-----------------------------|
| Contract Number: | Contract Value: |
| Contract Start Date: | Publication Date: 2/18/2019 |
| Incumbent: | Contract Length: |
| Security Requirement: | Opportunity Type: |
| Contract Type: | Set Aside: |

Account Information

| | |
|--------------------------------|-------------------|
| Customer: | |
| Contracting Officer (CO) | Proposal Manager: |
| Contracting Officer Email: | |
| POC Contracting Officer Phone: | |

Privia Overview - Process to Activities



Privia Overview

- Capture Opportunity Data
- Assign Tasks/Activities with a repeatable process
- Collaborate
- Produce Response
- Submit
- Repeat



Persona Demo



Permissions: Contributor

Contributor type – Contributor, Team Member, **OR** anyone with a teammate license.

- No access to reports at all
- Limited to document management functionality.
- Intended for:
 - A. Content Writes
 - B. Graphic Artists
 - C. SME's
 - D. External Partners

| Contributor |
|--------------------------|
| Data Administrator |
| ✓ Executive |
| Manager |
| Past Performance Manager |
| Team Member |
| Teammate |
| TO Business Developer |
| TO Executive |
| TO Proposal Manager |

Permissions: Manager

Manager type – Manager, TO Business Developer, TO Proposal Manager

- Allows access to reports
- Limited to opportunities that User has access to.
- Intended for:
 - A. Business Developers
 - B. Proposal Managers
 - C. Team Leads

| |
|--------------------------|
| ✓ Contributor |
| Data Administrator |
| Executive |
| Manager |
| Past Performance Manager |
| Team Member |
| Teammate |
| TO Business Developer |
| TO Executive |
| TO Proposal Manager |

Permissions: Executives

Executive/Lead type – More visibility. The Executive type can create and view reports across Organizations and Projects regardless of membership

- Allows access to reports
- Can view report data across the entire system.
- Intended for:
 - A. Executives
 - B. Directors
 - C. Proposal Leaders
 - D. Heads of Departments
 - E. Skilled System Administrators

Contributor

Data Administrator

Executive

Manager

Past Performance Manager

Team Member

Teammate

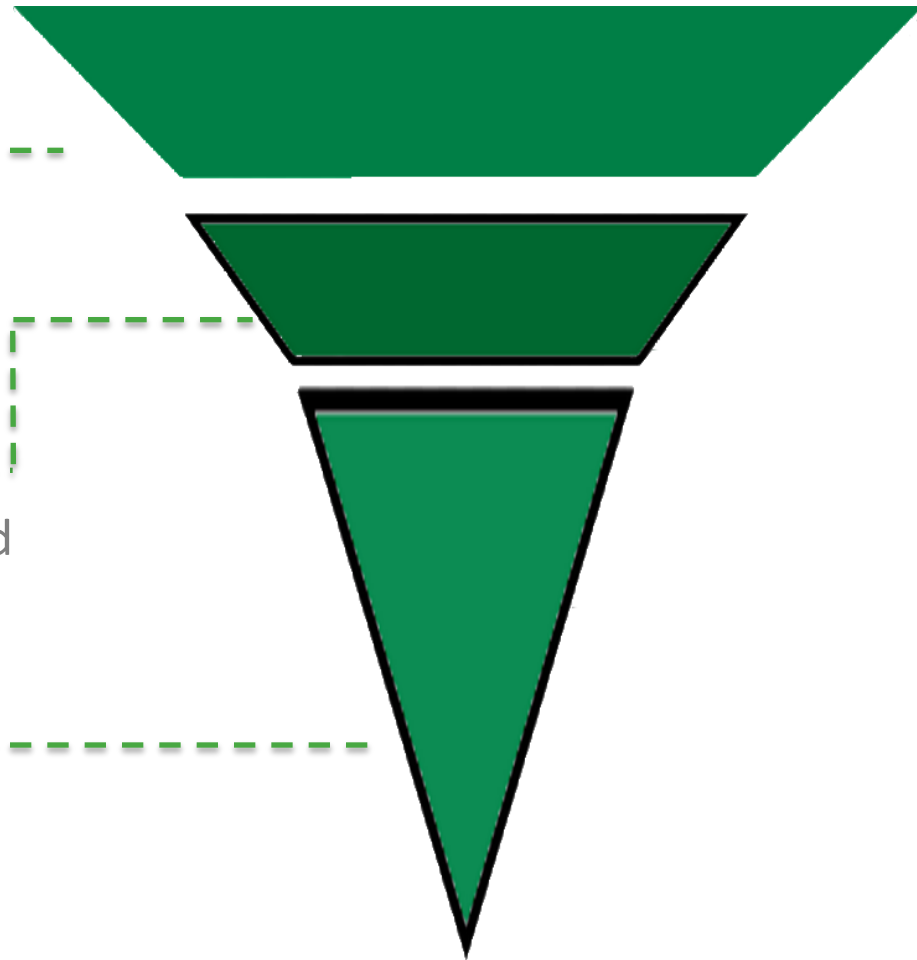
TO Business Developer

TO Executive

TO Proposal Manager

Permissions: Recap

- **Permissions: Executives:** Can Access Reports - with Unlimited visibility to all Opportunities (even if they are not a member)
- **Permissions: Manager:** Can Access Reports - but limited assigned projects only
- **Permissions: Contributor:** No Access to Reports, Content writers, SMEs, External Partners



Four Report Types

Reports are designed to enable greater visibility into the projects and each type of report targets specific data.

- Opportunity
- Process
- Activity
- Metadata

The screenshot displays the Privia web application interface. The left sidebar contains navigation links: Home, Activities & Alerts, Workspaces, Notifications, Reports (highlighted), All Opportunities, Pipeline, All Resources, Lookups, Performance, New, View, and Customize. The main content area is titled '!! Process - Report'. Below the title is a toolbar with icons for Edit, Delete, Print, Export, Transfer Ownership, Options, Save Settings, and Copy Report. The report details show: Name: !! Process, Owner: Privia - Whiteoak, Richard, Visibility: Everyone can see this report, and Type: Processes. A table titled 'Report Results' contains the following data:

| Title | State | Account - Account Name | Opportunity Status |
|--|-------------|------------------------|--------------------|
| Y--SOURCES SOUGHT NOTICE FOR UPH-BEQ BUILDING 3609 RENOVATION AT JEB LITTLE CREEK-FORT STORY, VIRGINIA BEACH, VA | In Progress | | |
| University of AZ SLA | In Progress | Privia | |
| United Oil Standby Generators | Completed | Privia | |
| United Oil SLA | Completed | Privia | |
| United Oil Plant Standby Generators | Completed | Privia | |

Opportunity Reports

A preliminary set of data fields are made available for Opportunities in your pipeline. Additional data fields are “unlocked” after an Opportunity is launched.

- Opportunity Reports will target the common fields available to both Pipeline and Launched Opportunities.

The screenshot displays the Privia web application interface. At the top right, it shows the user's persona as 'Manager' and their name as 'Richard Whiteoak'. Navigation links for 'Personas', 'Tools', 'Support', and 'Logout' are provided. The left sidebar contains a menu with options: Home, Activities & Alerts, Workspaces, Notifications, Reports, Opportunities (highlighted), Pipeline, All Resources, New, and View. The main content area is titled 'Active Opportunities'. It includes a 'List of:' dropdown menu set to 'Active Opportunities' and a 'Summarize:' dropdown menu set to 'No Summary'. Below these are buttons for 'Print' and 'Export'. A table header is visible with columns: 'Master Project - Acronym', 'Name', 'Solicitation Number', and a circular icon. The table body currently shows 'No Items'.

Process Reports

Process Reports will only target data from Launched Opportunities and combines Opportunity Data Fields and data fields that are specific to the Process

- Launched Opportunities only
- All Launched Opportunity data fields are available
- Most commonly used

Opportunities won and lost - Report

Click 'Save Settings' to keep changes made to column widths and settings through Options.

Edit | Delete | Print | Export | Transfer Ownership | Options | Save Settings | Copy Report

Name: Opportunities won and lost Visibility: Everyone can see this report
Owner: Privia - McConville, Jay Type: Opportunity

[Go to Pie Chart](#)

Dynamic Filters

Applied Dynamic Filters

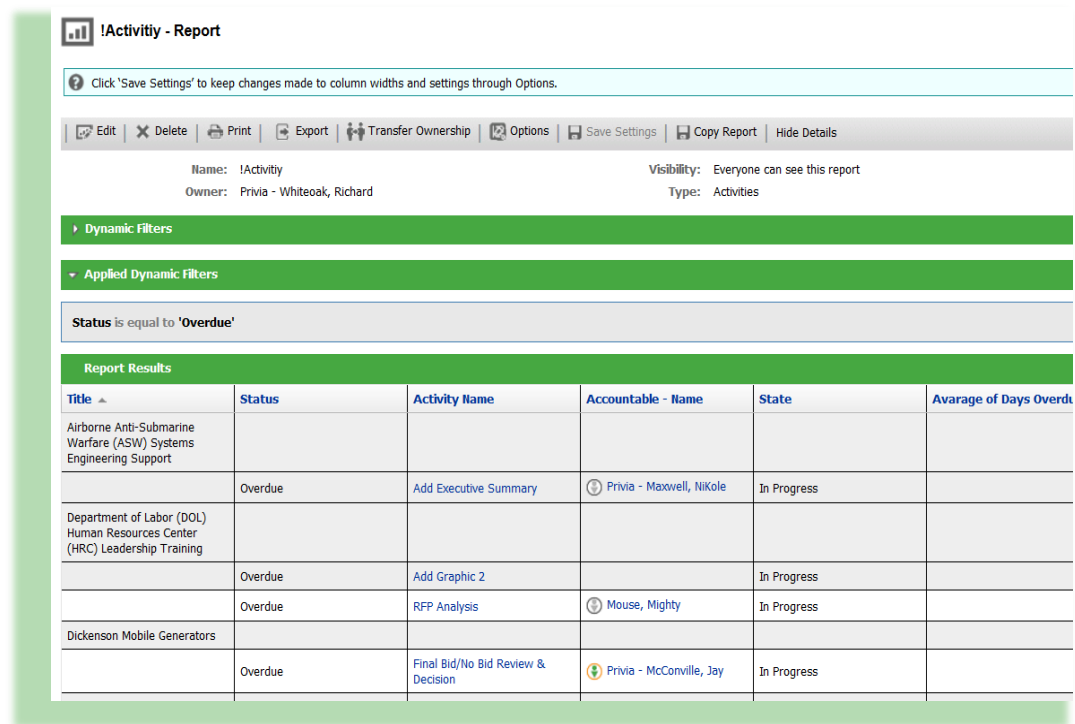
Total Estimated Revenue between 10000 and 400000

| Report Results | | | | | | |
|----------------|---|-------------------------|------------------|-------|----------------------|-----|
| | Title ▲ | Total Estimated Revenue | Opportunity Type | P-WIN | Probability of Close | Aw |
| | Electronic Document and Records Management System | \$82,500.00 | New | Won | 90 | 06/ |
| | Field Deployable Environmental Control Unit | \$327,000.00 | Recompete | Won | 20 | 06/ |
| | NEXTGEN SURVEILLANCE AND WEATHER RADAR CAPABILITY (NSWRC)-(Source: INPUT) | \$260,000.00 | New | Won | 90 | 06/ |
| | Tanker Voyage Charter in the Middle East | \$120,000.00 | | | 0 | |

Activity Reports

Activity reports are a hybrid between the Opportunity data, process, and some fields that are specific to tracking activities.

- Used to see trends in user completed tasks
- Track how often projects are overdue/At-Risk



Activity - Report

Click 'Save Settings' to keep changes made to column widths and settings through Options.

Edit | Delete | Print | Export | Transfer Ownership | Options | Save Settings | Copy Report | Hide Details

Name: Activity
Owner: Privia - Whiteoak, Richard
Visibility: Everyone can see this report
Type: Activities

Dynamic Filters

Applied Dynamic Filters

Status is equal to 'Overdue'

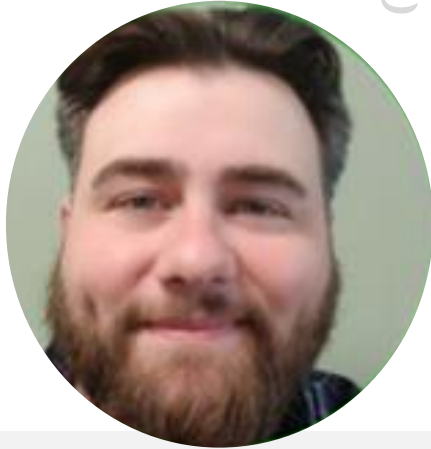
Report Results

| Title | Status | Activity Name | Accountable - Name | State | Average of Days Overdue |
|--|---------|--|--------------------------|-------------|-------------------------|
| Airborne Anti-Submarine Warfare (ASW) Systems Engineering Support | | | | | |
| | Overdue | Add Executive Summary | Privia - Maxwell, Nikole | In Progress | |
| Department of Labor (DOL) Human Resources Center (HRC) Leadership Training | | | | | |
| | Overdue | Add Graphic 2 | | In Progress | |
| | Overdue | RFP Analysis | Mouse, Mighty | In Progress | |
| Dickenson Mobile Generators | | | | | |
| | Overdue | Final Bid/No Bid Review & Decision | Privia - McConville, Jay | In Progress | |

Real-Time Proposal Reporting



Thank you!



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