

# WEBS MANUAL - CUSTOMER GUIDE

This document outlines the steps on how to post a solicitation, amend, and close out a document in Washington's Electronic Business Solution (WEBS). WEBS is the bid notification system Department of Enterprise Services (DES) uses to post all solicitations.

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# **Necessary Tools**

- ➤ If a username and password to WEBS is needed, contact WEBS Customer Service at 360.902.7400 or <a href="mailto:webscustomerservice@des.wa.gov">webscustomerservice@des.wa.gov</a> or the WEBS Administrator at your organization.
- > Check with your organization before posting a solicitation for any specific naming conventions (some organizations title their solicitations a specific way).
- ➤ WEBS may experience issues using the browser Google Chrome. Use Internet Explorer or Mozilla Firefox if you experience issues in Chrome.

# Introduction to WEBS

# RCW 39.26.150

Public notice—Posting on enterprise vendor registration and bid notification system.

- (1) Agencies must provide public notice for all competitive solicitations. Agencies must post all contract opportunities on the state's enterprise vendor registration and bid notification system. In addition, agencies may notify contractors and potential bidders by sending notices by mail, electronic transmission, newspaper advertisements or other means as may be appropriate.
- (2) Agencies should try to anticipate changes in a requirement before the bid submittal date and to provide reasonable notice to all prospective bidders of any resulting modification or cancellation. If, in the opinion of the agency, it is not possible to provide reasonable notice, the submittal date for receipt of bids may be postponed and all bidders notified.

## WHO CAN USE WEBS?

Per RCW 39.26.150, agencies are required to use WEBS to post solicitations. Political subdivisions (i.e. cities, counties, higher educations, tribes, etc.) have the option to use WEBS, but it is not a requirement.

## WHAT IS A COMMODITY CODE?

WEBS uses the commodity code list maintained by National Institute for Government Purchasing (NIGP).

NIGP Code is a universal taxonomy for identifying commodities and services in procurement systems. It is available as a 3-digit class code, a 5-digit class-item code, a 7-digit class-item-group code, and a detailed 11-digit code

Vendors register in WEBS and select commodity codes applicable to their business. When posting a solicitation, it is important to know what commodity code is best for the solicitation so vendors receive notification of the opportunity.

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# **WEBS Layout**

# Manage Users

This field is only available for users that are Administrators. An administrator manages all the WEBS accounts for an organization. They have the ability to add, edit, and delete users from that specific organization. Typically, a manager of a procurement division or an administrative assistant is the user. If "Manage Users" is not listed, then you are not an administrator. If you need to be an administrator, contact an Administrator in your organization and have them change your role to "Admin." Contact WEBS Customer Service if you do not know your Administrator.

## ADDING USERS:

1. Click "Manage Users".

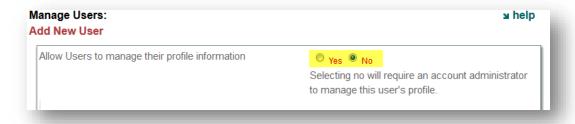


2. Click "Add".



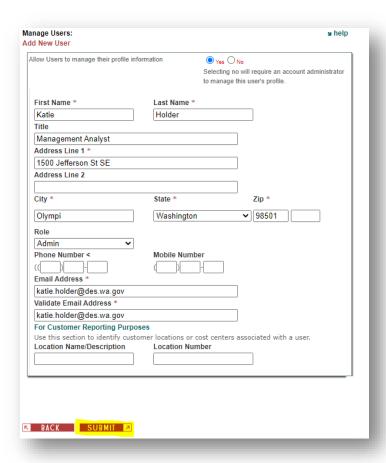
3. Complete the required information, using the organization's address, email, and phone number.

Note: If this person should manage their account, change the option from no to yes:



4. Click "Submit" at the bottom.

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5. The employee should receive an email prompting them to click a password link. The employee will then create a new password.

# **REMOVING USERS:**

1. Click on "Manage Users".



2. Locate the person (the list is sorted alphabetically by last name). Use the page numbers in the bottom right corner to navigate to the rest of the list.

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3. Click "Remove" on the right hand corner. There is no pop up confirmation, so ensure you have the correct person before clicking "Remove".

Ghanie , Alisha	alisha.ghanie@des.wa.gov	(360) 407-9033 Yes	edit remove

## **EDITING A USER'S INFO:**

1. Click on "Manage Users".



2. Locate the person (the list is sorted alphabetically by last name). Use the page numbers in the bottom right corner to navigate to the rest of the list.



3. Click "Edit".



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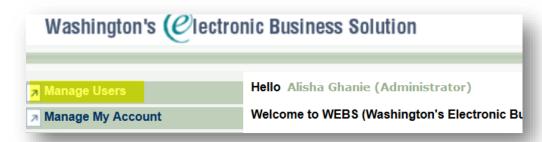
## WEBS Customer User Guide

4. Alter the information and select "Save". Resetting a password for someone can also be done by clicking Reset Password.



#### INACTIVATING OR ACTIVATING A USER:

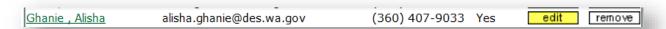
1. Click on "Manage Users".



2. Locate the person (the list is sorted alphabetically by last name). Use the page numbers in the bottom right corner to navigate to the rest of the list. For the list of already inactive users, use the drop down menu in the top left corner of the page and select "inactive".

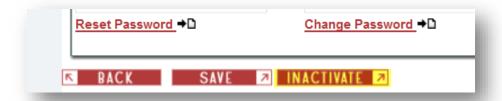


3. Click "Edit".



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4. Click "Inactivate" to disable the account. Click "Activate" to enable the account.

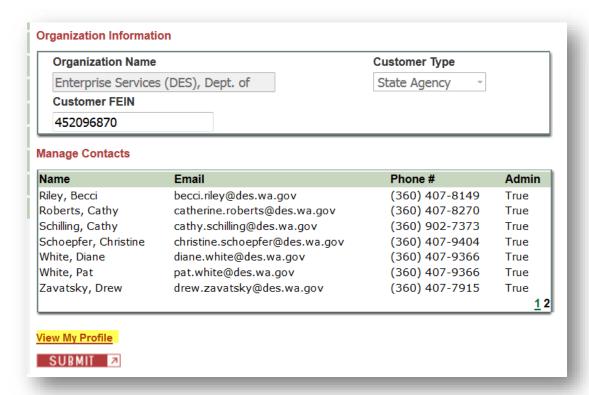


# Manage My Account

1. Click on "Manage My Account".

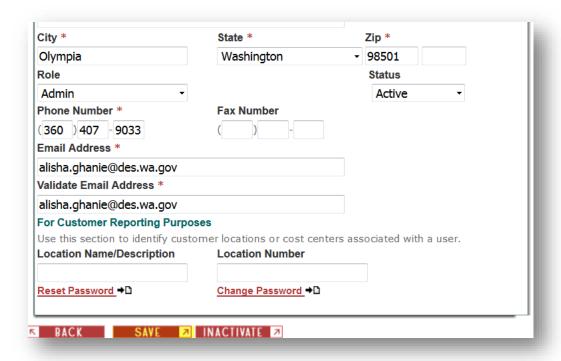


2. Altering the Customer FEIN number is the only area that can be altered for the organization. Click on "View My Profile" to see the information pertaining to you.



3. Alter the profile information as necessary and click "save".

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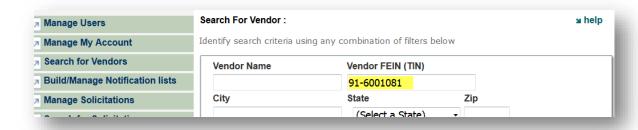


# Search for Vendors:

1. Click on "Search for Vendors"



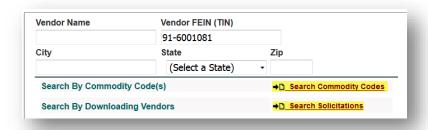
2. If looking for a specific vendor, use their FEIN (Tax Identification Number). Vendors may have similar names, so using their FEIN number will narrow the search.



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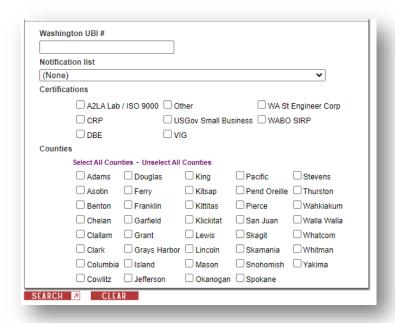
There's a multitude of ways to search for vendors. If searching for a list of vendors, search by commodity code. Searching by solicitations is also an option that will provide a list of vendors who downloaded the solicitation .



Other vendor search options are searching by OMWBE status, self certified small, and veteran-owned.



You can also search by UBI #, notification list, and county. To see vendors by Notification List, select the drop down option under "Notification List":



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# SEARCHING FOR VENDORS WHEN LOGGED OUT:

You can also search for vendors even if you are not logged in to the system.

1. Visit the WEBS



- 2. Click the "search for other businesses" button.
- 3. Follow the same steps from above for how to search for vendors for customers.

# **Build/Manage Notification Lists**

## WHAT IS A NOTIFICATION LIST?

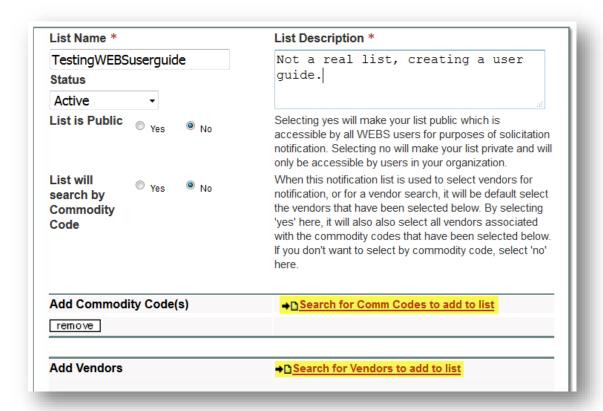
A notification list consists of vendors who are awarded on a qualified category in a contract. The list is created and maintained by the procurement coordinator. Customers who want to purchase from a category with a notification list will post a solicitation to just that notification list. Only the vendors on that list will receive the solicitation opportunity.

# BUILDING AND MANAGING THE LIST(S):

1. Click on "Build/Manage Notification List. To build a new list, click "Add".



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3. To add vendors, click on "Search for Vendors to add to list". This will take you to the search vendor screen. Use the section "Search Vendors" of this user guide to locate vendors and add them to the notification list.

**Note**: When selecting vendors, click "save" at the bottom before navigating to other pages.

4. To manage the list, find the notification list and click on it:



- 5. Make changes and click "Save".
- 6. To delete a list, locate and select the check box to the right, then scroll to the bottom and click "delete".



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# Manage Solicitations

## POSTING A SOLICITATION:

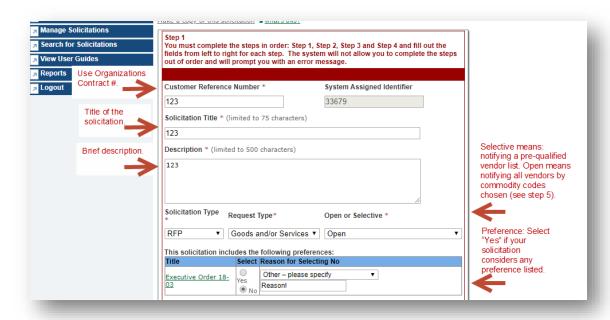
- 1. Log in to WEBS.
- 2. Click on "Manage Solicitations" in the left hand menu.



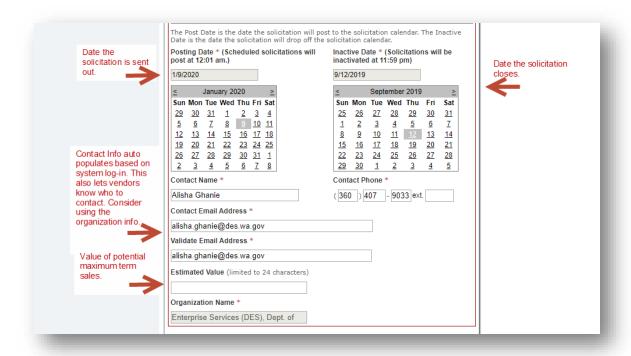
3. Click on "Add New Solicitation" at the top of the page.



4. Complete Step 1. Everything with an asterisk must be filled out. You will not be able to move on to step 2 until step 1 is complete.



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## 5. Fill out step 2

a. Click on "Select Counties" in the middle of the page.

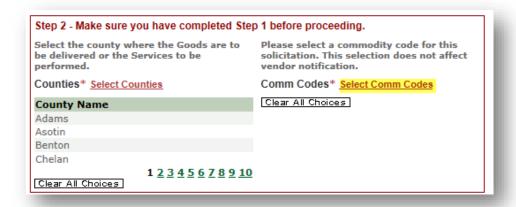


i. Select all counties that will be serviced in the solicitation, then click "Save".

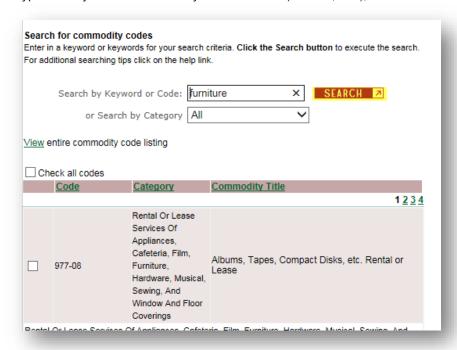


b. Click on "Select Comm Codes".

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i. Type in a key word or commodity code numbers (960-14, etc.), then click Search.



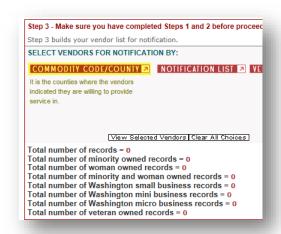
ii. If there are multiple pages of commodity codes, select the ones that apply (check the box next to the code) on one page, click "save" then click on the next page and so forth. Once all commodity codes are selected, click "Save and Close".

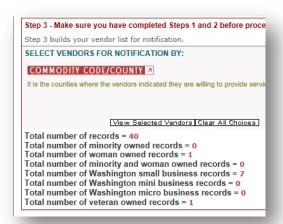


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- 6. In step 3, populate the vendors that will be notified by clicking on "Commodity Code/County".
  - a. If posting a solicitation that is "Selective" (meaning there is a pre-qualified list of vendors), do not click on the button shown in the "before" picture. Click the "Notification List" button and locate the correct list, then click save.

Before After



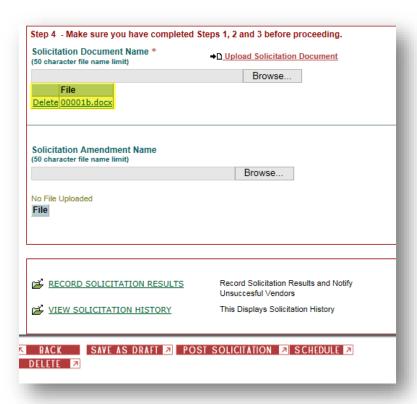


7. In step 4, click Browse, find the solicitation document, then click "Upload Solicitation Document". Note: Please title your documents in a way that will be easy for the vendor to understand what the document contains. For example, "ExhibitC\_PerformanceRequirements" is a clear, easy way to describe the contents of the document for the vendor.

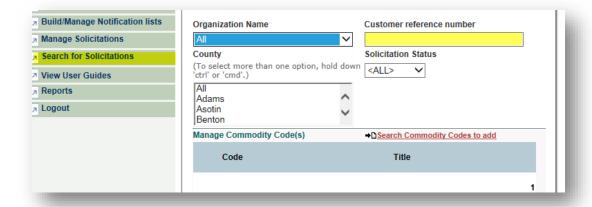


- 8. If ready to post, click "Post Solicitation".
  - a. If not ready, click "Save as Draft". When ready to post, log back in and search for your bid under "Manage Solicitations". Go to the drop down arrow and select "Draft", find the solicitation and post when complete.
    - i. There is also the option to "Schedule" the solicitation so that you can pre-plan a date in the future for the solicitation to post.

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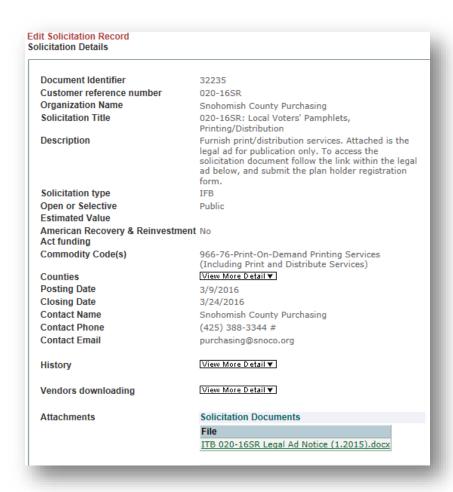


9. To view the solicitation after it is posted, click on "Search for Solicitations" and type in the Customer reference number, then click "Search" at the bottom:



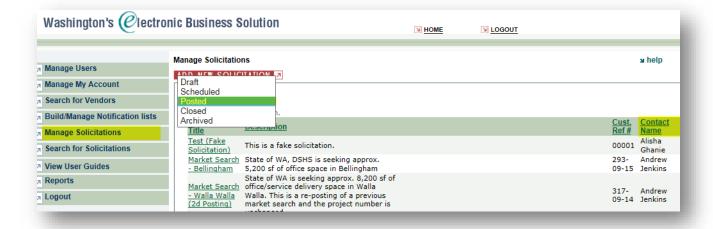
a. This is an example of what the solicitation looks like when clicked on:

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## **AMENDING A SOLICITATION**

1. To post an amendment, click on "Manage Solicitations", change the drop down to "Posted" and click on "Contact Name" to locate the solicitation. Then click on the solicitation.



2. Scroll to the bottom and upload the amendment document in the amendment browse section. (Check with your organization to see if there are specific naming conventions for amendments).

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b. **Very Important:** After the amendment uploads, change the bid close date or inactive date in Step 1 before clicking "Save" at the bottom.

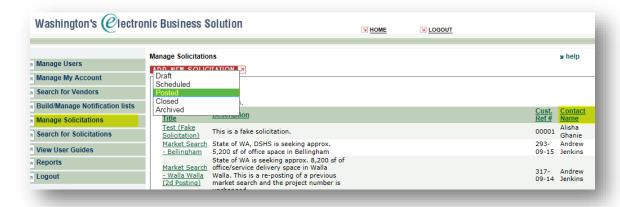
**Note**: If needing to change the solicitation close date, an amendment must be posted. Once an amendment is uploaded, the date fields will unlock. This will allow the dates to be changed before posting/saving.

## RECORDING SOLICITATION RESULTS AND ARCHIVING THE SOLICITATION

#### RECORD RESPONSIVE BIDDERS AFTER SOLICITATION DUE DATE

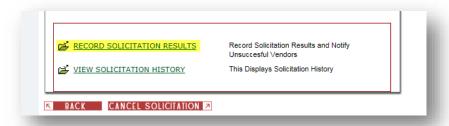
- 1. Locate the solicitation by using the dropdown menu on the "manage solicitations" tab. The drop down menu has an option to view:
  - a. Drafts solicitation was started and saved, but not posted yet.
  - b. Scheduled solicitations scheduled to be posted in a future date.
  - c. Posted currently posted/open.
  - d. Closed no longer posted and not accepting more bids, but more steps are needed on the customer side (such as marking responsive bidders, marking ASB, and marking awarded bidders.
  - e. Archived all steps are complete and solicitation is fully closed out and no more changes can be made.

To record solicitation results, you will want to select the "closed" drop down option, since results can only be recorded when a solicitation has closed.



2. Scroll to the bottom of the solicitation's page and click on "Record Solicitation Results".

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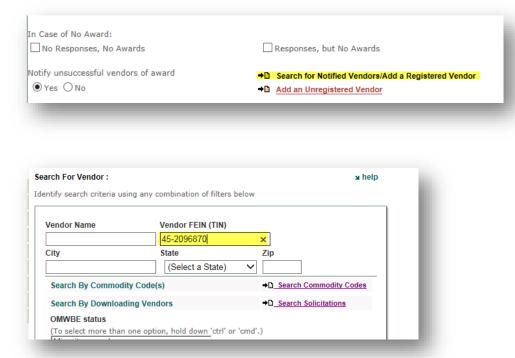


Check the responded box next to the vendors that submitted a bid with the date their bid was submitted.



a. If a vendor cannot be located in the list, you can scroll to the bottom and click on "Search for Notified Vendors/Add a Registered Vendor", and add your vendor manually. Additionally, you can add a vendor who is not registered in WEBS by clicking "add un unregistered vendor", but please encourage vendors to register in WEBS if possible.

The best way to locate a vendor is to search their Tax Identification Number (TIN) or the vendor's name. Type their information in and click search. Select their company and click save.



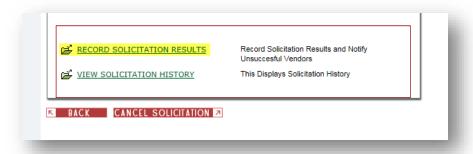
4. Save the list of responded vendors.

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## RECORDING APPARENT SUCCESSFUL BIDDER (ASB) AND SENDING ASB NOTIFICATION

If an apparent successful bidder is not applicable to your solicitation, skip to the bypassing section.

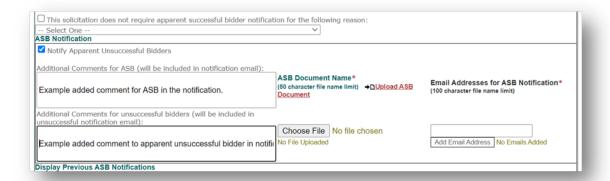
Once the evaluation is completed, locate the solicitation and click on "Record Solicitation Results".



2. Select the Apparent Successful Bidder(s) (ASB).



a. After the ASB is selected, you have the option to include additional comments for the ASB notification template (there is an option to add a comment to both the ASB and the apparent unsuccessful bidders. ASB will only be able to see the comments from the first box, and similarly unsuccessful bidders will only be able to see the comments from the second).



- b. You can also add a comment to be linked in the ASB notification. To include a file, click "choose file" and then click "upload ASB document". The file link will only be sent to the ASB.
- c. The ASB notification will automatically go to those vendors who are checked as "ASB", and the email address assigned to the person who posted the solicitation will automatically be

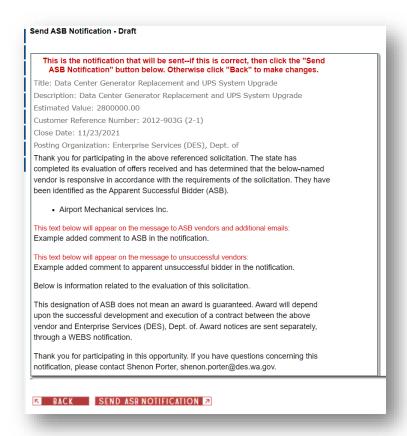
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copied on the notification. You can chose to add additional email addresses to receive a copy. The added emails will only receive the ASB notification comments (not the unsucessful bidder comments).



If you check the box to "notify apparent unsuccessful bidders", vendors who were marked as "responded", but not marked as "ASB", will receive a notification in conjuction with the ASB receiving a notification. If this box is not checked, a notification will only be sent to the ASB (vendors marked as responded, and as marked "ASB").

3. When you are ready to send the notification, scroll to the bottom of the page and click "send ASB notification". A pop-up box will show up as a confirmation that you are ready to send (as this will start the debrief/protest process). Click OK. A preview of the ASB notification will appear. The notification is a standard template that cannot be altered, however, you can alter the comments section within the notification email by clicking back before committing to send. Otherwise, click "send ASB notification" to send.



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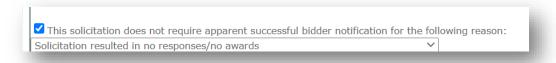
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4. If additional ASBs are required, each notification will be stored in WEBS, and you can view any previous ASB notifications, and the date they were sent, by clicking "display previous ASB notifications" and using a drop down menu to select the notification/date.



## BYPASSING THE ASB SECTION:

If the ASB process is not applicable to your solicitation, you can bypass this step in the WEBS process. To bypass, scroll down to the ASB bypass drop down menu, check the box for "this solicitation does not require apparent successful bidder notification" and select the appropriate reason for exemption. Click "save changes" at the bottom of the page. When the page refreshes you should have the ability to move forward to award/archive the solicitation.



Only the following scenarios are currently exempt from the ASB section:

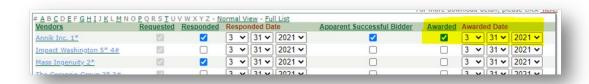
- RFI posting if your solicitation is a request for information (RFI) select the option for "RFI posting".
- Courtest posting if your solicitation is a courtesy post select the option for "Courtesy posting".
- Engineering or architectural services solicitations these solicitations fall under RCW 39.80 and are not required to notify ASB through WEBS.
- Higher education solicitations these solicitations fall under RCW 28B.10.029(1)(a) and are not required to notify ASB through WEBS.
- Public works solicitations these solicitations fall under RCW 39.04 and are not required to notify ASB through WEBS.
- Sole source postings if your solicitation is a sole source select the option for "sole source posting".
- Solicitations that received no responses, or received responses but resulted in no awards if your solicitation did not receive responses, or no vendor was selected to be awarded, select "solicitation resulted in no responses/no awards".
- Solicitation clean up if you are in the process of archiving old solicitations, where the ASB
  has already been sent outside of WEBS (prior to the April 2021 ASB enhancement), you can
  select the option for "old solicitation close out/clean-up effort".

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## RECORDING AWARDED VENDORS

1. Affer the debrief and protest period has ended, locate the solicitation and click on "Record Solicitation Results"

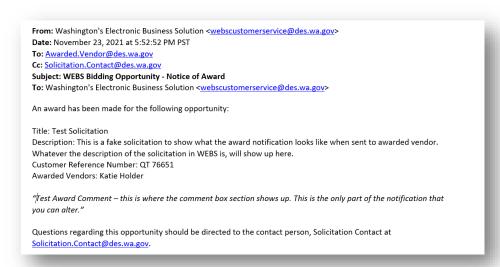




a. If no vendors were awarded, select the appropriate checkbox at the bottom of the page, indicating there were no awards. Click "Save Changes" at the bottom.



3. Just like with the ASB notification comments, you can chose to add additional comments to the Award notification if you'd like.



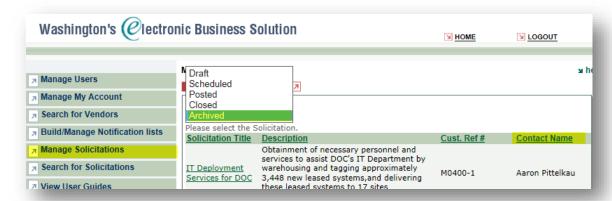
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4. Scroll to the bottom of the page and click on "Send Notification/Archive Solicitation".

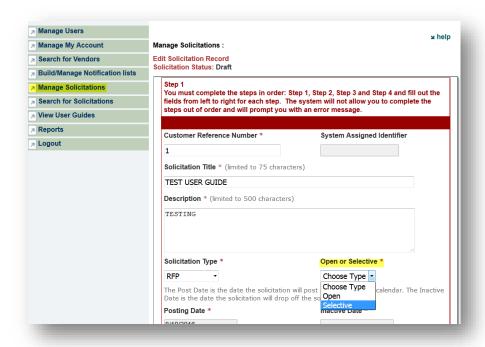


5. To view the solicitation after being archived, click on "Manage Solicitations". Change the drop down option to "Archived" and sort the contact name. Locate the solicitation and click on it.



## POSTING A SOLICITATION TO A NOTIFICATION LIST:

1. Go to "Manage Solicitations" and then click the "Add New Solicitation" tab at the top of the page. Enter general solicitation information and complete all required fields. Very Important: Choose "Selective" from the "Open or Selective" drop-down menu.



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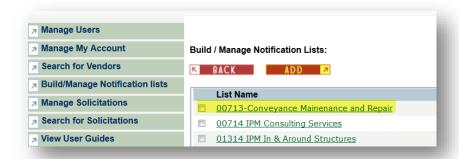
- The next step has no effect on who will be notified of your solicitation since you will be selectively posting to a prequalified pool of vendors in the next step. Nonetheless, these are required fields for system search requirements.
  - Click "Select Counties" and select the county in which the work is to be done and scroll down and click "Save".
  - Click "Select Comm Codes", enter a keyword or code and click "Search". Select a commodity code that closely represents the work to be completed. Scroll down and click "Save".



- 3. Select vendors for notification.
  - Important: Only use the "Notification List" or "Vendor Search" tabs NOT the "Commodity Code/County" tab.



- Recommended Notification Method: Notify ALL vendors within a prequalified list.
- In accordance with the intent of RCW 39.26 to promote open competition and transparency for all contracts for goods and services entered into by state agencies, DES recommends that all vendors are selected within a pregualified list.
- Select the Notification List tab and then select the category by title. Scroll down and click "ADD". This will notify all vendors within the pregualified list for your category.



4. Continue with the rest of the posting steps.

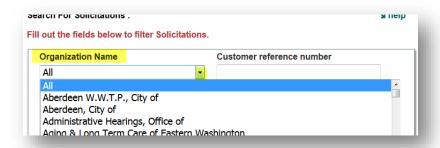
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# Search for Solicitations:

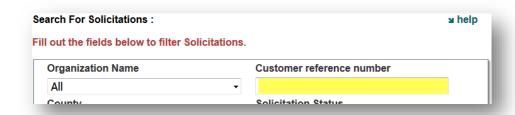
1. Click on "Search for Solicitations".



Search for solicitations by Organization Name by clicking on the drop down arrow:

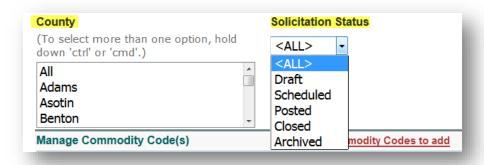


> Search by a customer reference number if there is a specific solicitation. The number is created by the organization's bid coordinator.



> Search for a solicitation by county(s) by holding the "ctrl" button down to select multiple counties. Search by solicitation status by clicking the drop down button.

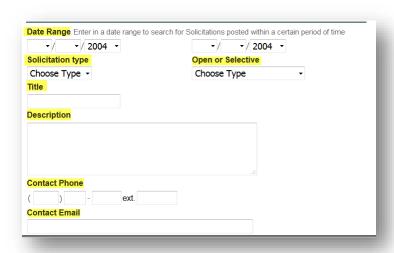
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Search for a solicitation can also be done by commodity code:



> Solicitations can also be searched by a date range of postings, solicitation type, open or selective, title of the solicitation, description, contact phone or contact email. When searching, enter one field for a broader search or enter multiple fields with as much information as possible to narrow the search.



2. Click search once all the search fields of your choosing are entered. The system will provide all the solicitations that fit the search criteria:

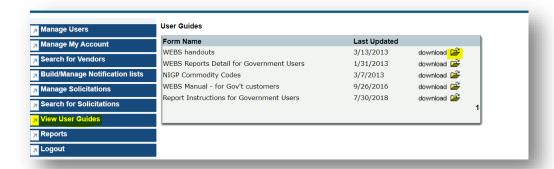
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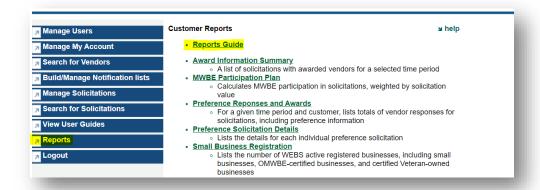
3. Select the solicitation to view more detail. The status of the solicitation is listed to the right.

# View User Guides

1. To view the user guides, click "View User Guides" and click the download button to the right.

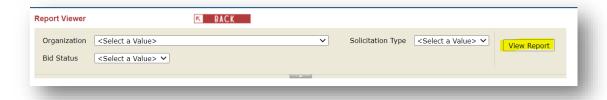


# Reports



2. Whichever report you chose to run, just make sure all drop down information boxes are filled out, and click "View Report" to run it.

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# Logout

Clicking log out will automatically log a user out of the system.



Sources: 39.26.150 Public Notice, WEBS

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