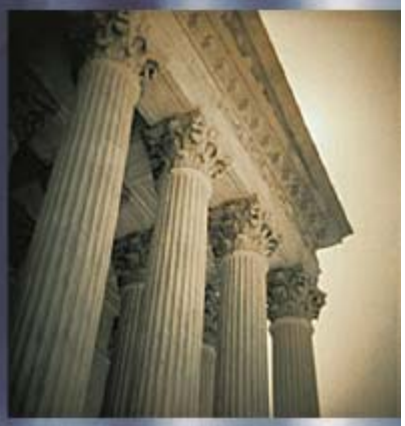
Tier

Expect A Lot



WebProcure 4.2

Supplier User's Reference Manual

June 2005

Instructions

Bookmarks

Bookmark links have been created to provide easy access to individual sections. To view bookmarks:

- Click the **Bookmarks** tab on the left side of the window

  OR

- From the **View** menu, point to **Navigation Tabs** and then click **Bookmarks**.

Search

Acrobat Reader offers the capability to search for keywords and phrases in the document. To use the search function:

- Click the **Search** button

  OR

- From the **Edit** menu, click **Search** (Ctrl+F)

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Introduction

Welcome to *WebProcure*. *WebProcure* is a Web-based procurement software solution designed and built specifically for public sector agencies. *WebProcure* helps suppliers enhance their business relationships with these agencies by streamlining the bid/quote process, automating order management, and improving communication about business opportunities. By registering on *WebProcure*, suppliers will automatically receive notification of bid and quote opportunities from participating buying organizations.

This User's Reference Manual is intended to help you navigate through the *WebProcure* system with ease and efficiency. If you are unable to find an answer to your questions, please contact our Customer Support Team at WebProcureSupport@tier.com.

Logging On

WebProcure can be accessed through the following web page:

https://eproc.nassaucountyny.gov/Login

1. In the **Username** field, enter your user name.
2. In the **Password** field, enter your password.
3. Click Login.

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Note:

If you have forgotten your user name or password, click ***Forgot your username or password? Click here.***

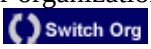
Complete the Forgot Password process and a new password will be sent to you via the e-mail account you registered with the WebProcure system.

Switch Organizations

If you are associated with more than one organization in the *WebProcure* system, you have the option to switch between organizations without having to log off from and log back on to the system.

After logging on, the **Organizations You Represent** page will open.

Select the organization that you want to represent. Every action that you perform within the *WebProcure* system will be associated with the organization selected.

Select another organization at anytime by returning to the **Home** page and clicking Switch Organization 

from the main navigation bar.

Note:

If you belong to only one supplier organization within the WebProcure *system, you will be taken directly to the* ***Home*** *page when you log on.*

Home Page

The **Home** page is the entrance to each of the different *WebProcure* modules. The left frame of the page will display all the *WebProcure* modules that you have permissions to access *WebProcure*.

You can return to the **Home** page at anytime to select a different module by clicking **Home**

, located on the main navigation bar of the *WebProcure* system.

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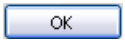
Logging out

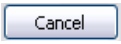
You can exit the *WebProcure* system from any page by clicking Logout

.

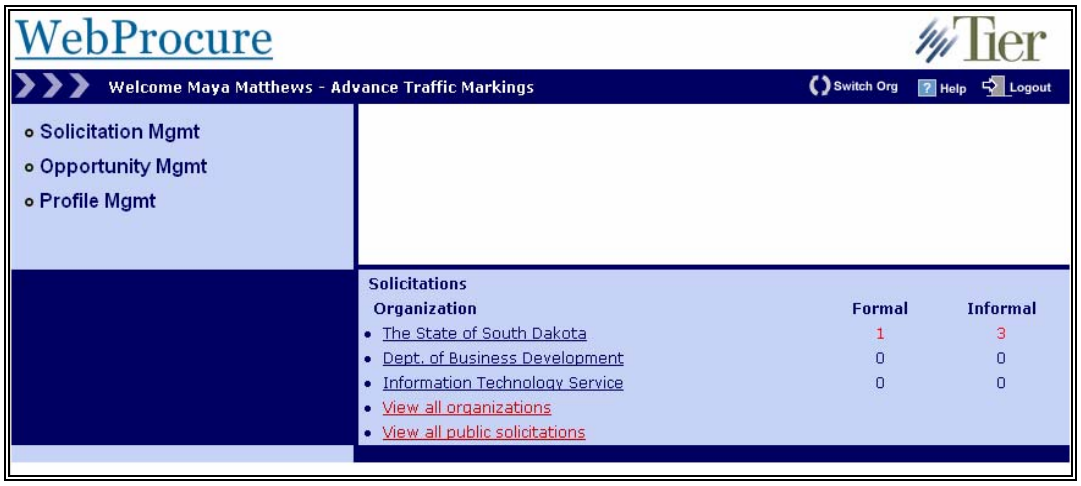
A message window will open to verify that you want to log off from the system as shown below.

Click OK 

to complete the log out process.

Click Cancel 

to resume your work within the *WebProcure* system.



Solicitations

In the right frame of the **Home** page is the **Solicitation Organizations** section as shown below.

A list of all the buying organizations for which your supplier organization is an approved supplier will be listed in the **Organization** section.

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Beside each organization's name will be the current number of **Formal** and **Informal** solicitations each organization has available for review and response.

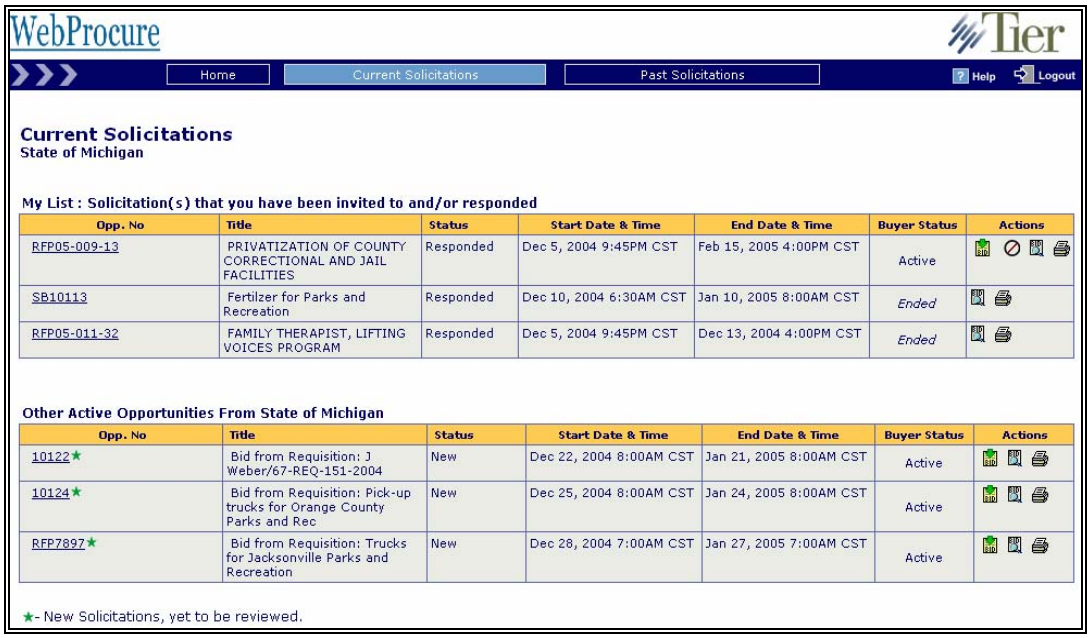
Select the organization's name to view a list of solicitations associated with that organization.

Note:

Click Home Home *from any page within the system to return to the* ***Solicitation*** *section and select another buying organization to review their solicitations.*

Current Solicitations

The **Current Solicitations** page is displayed after selecting an organization from the **Home** page as shown below. Note that **Current Solicitations** is highlighted in the main navigation bar.



The **Current Solicitations** page provides an overview of all the solicitations currently available for response for the selected buying organization. The solicitations are separated into two sections: **My List** and **Other Active Opportunities**.

My List

The **My List** section lists the solicitations that your supplier organization has been invited to participate in by the buying organization issuing the solicitation.

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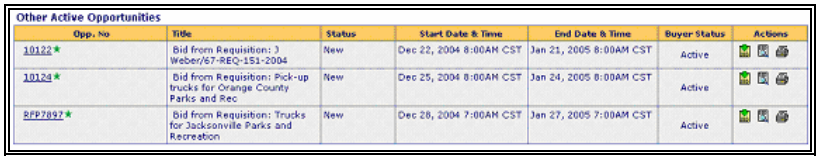
Other Active Opportunities

The **Other Active Opportunities** section lists the solicitations that are available for your review and response, but your organization was not specifically invited to participate by the buying organization.



Other Active Opportunities

Opp. No	Title	Status	Start Date & Time	End Date & Time	Buyer Status	Actions
10122 ★	Bid from Requisition: J Weber/67-REQ-151-2004	New	Dec 22, 2004 8:00AM CST	Jan 21, 2005 8:00AM CST	Active	
10124 ★	Bid from Requisition: Pick-up trucks for Orange County Parks and Rec	New	Dec 25, 2004 8:00AM CST	Jan 24, 2005 8:00AM CST	Active	
RFP7897 ★	Bid from Requisition: Trucks for Jacksonville Parks and Recreation	New	Dec 26, 2004 7:00AM CST	Jan 27, 2005 7:00AM CST	Active	

Note:

Most supplier organizations are pre-selected within the WebProcure *system during the solicitation creation process to be invited to participate in the solicitation. This pre-selected invitation is based on the commodity categories that are associated to your organization's profile, matching the commodity categories for the items that are part of a solicitation.*

Listed below is the information associated with each solicitation.

- **Opp. No.**

  The **Opp. No.** column displays the solicitation number assigned to the solicitation by the buying organization. Clicking an Opp. No. link located beside the solicitation opens the **Solicitation Overview** page.

  - **New Solicitation** ★

    Indicates a new solicitation that has yet to be reviewed by your organization

  - **Quick Bid**

    Indicates a new solicitation that has yet to be reviewed by your organization and alerts you that the End Date & Time is quickly approaching.

- **Title**

  Title is the name of the solicitation given by the buying organization.

- **Status**

  Lists the current status of the solicitation for quick reference.

  - **New**

    Indicates that the solicitation is a new solicitation and has not yet been viewed by your organization.

  - **Responded**

    Indicates that a response has been entered by your organization for the solicitation.

  - **Viewed**

    Indicates that the solicitation has been viewed by your organization.

- **Start Date & Time**

  Indicates the date and time the solicitation will be available for supplier review and response.

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- **End Date and Time**

  Indicates the date and time that the solicitation will be closed to supplier review and response.

- **Buyer Status**

  Lists the current status of the solicitation for quick reference.

  - **Active**

    Indicates the solicitation is available for supplier review and response.

  - **Ended**

    Indicates the solicitation is closed to supplier review and response.

- **Actions**

  - Submit/Edit Your Response

    Click the Submit/Edit Your Response icon to open the solicitation for response.

  - **View Solicitation Summary**

    Click the View Solicitation Summary icon to display an overview of the solicitation.

  - **Retract your Response**

    Click the Retract your Response icon to cancel or retract all the quoted items for this solicitation.

  - **Print**

    Click the Print icon to print the **Vendor Solicitation Report** for this solicitation.

How to Respond to a Solicitation

Begin responding to a solicitation by one of the following methods:

Click the solicitation number in the **Opp. No** column to display the **Solicitation Overview** page.

Or

Click the Submit/Edit Your Response icon in the **Actions** column to display the **Solicitation Overview** page.

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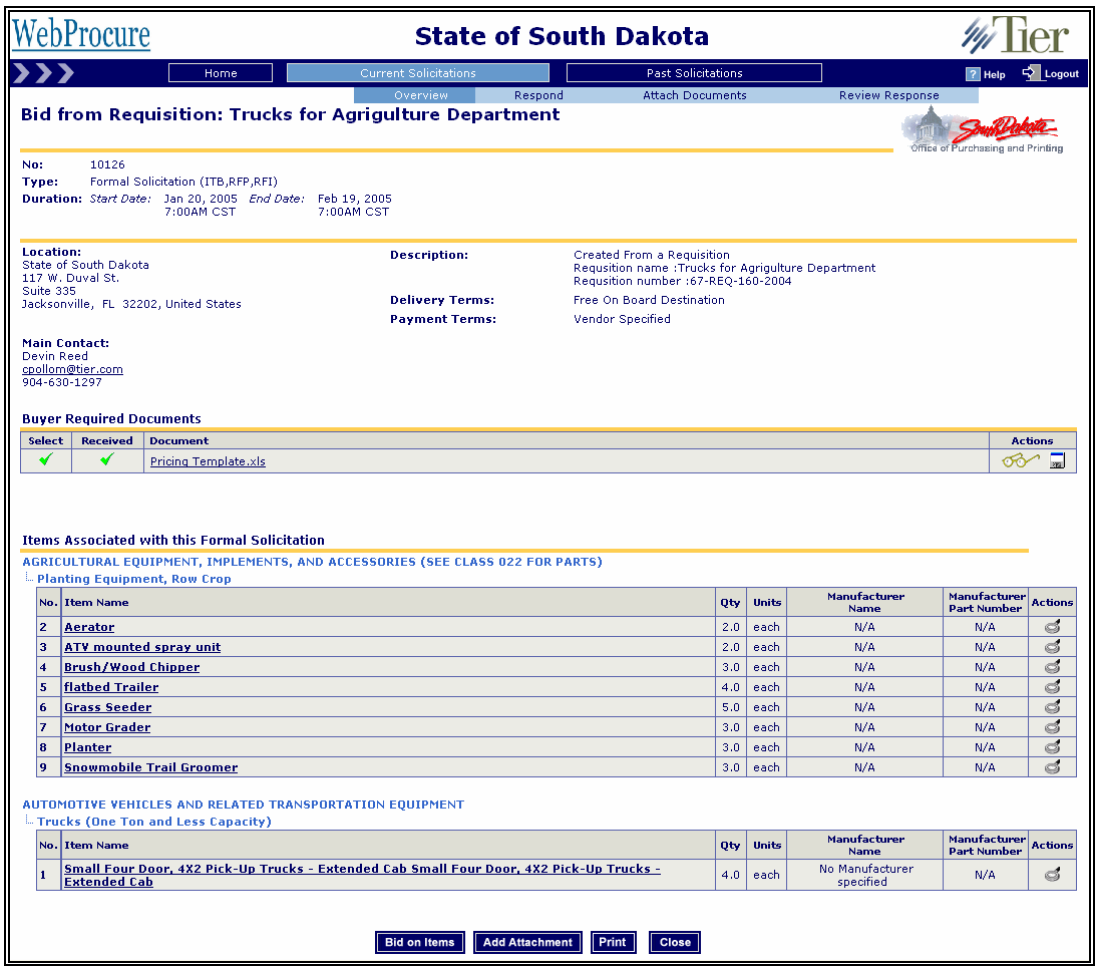
Solicitation Overview

The **Solicitation Overview** page is the default view and the first page in the response process as shown below.



The following information is included for each solicitation from the **Overview** page.

Header information

- **Title**

  The name of the buying organization assigned to the solicitation.

- **No.**

  The number assigned to the solicitation by the buying organization.

- **Type**

  Lists the type of solicitation.

  - **Formal**
  - **Informal**

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- **Duration**
  - **Start Date**

    Indicates the time and date that the solicitation will be available for supplier review and response.
  - **End Date**

    Indicates the time and date that the solicitation will be closed to supplier review and response.
- **Description**

  A description of the solicitation provided by the buying organization.
- **Delivery Terms**

  The delivery terms the buying organization has established for the solicitation items.
- **Payment Terms**

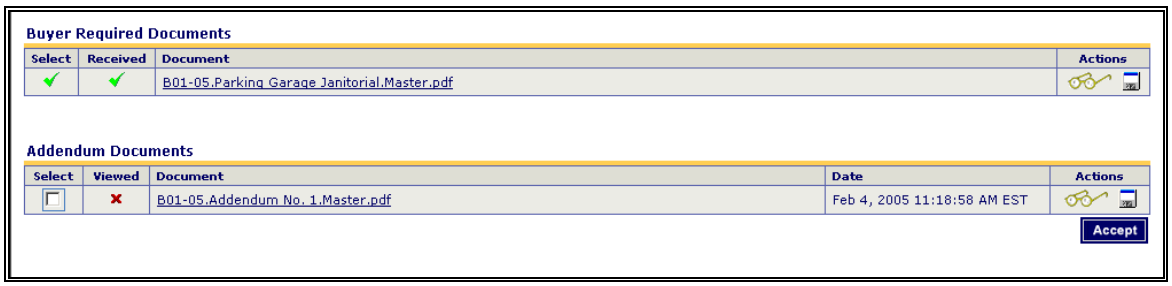
  The payment terms the buying organization has established for the solicitation items.
- **Custom Fields**

  There are five additional fields that may appear on the header information for the solicitations. These five fields will vary depending on the buying organization and type of solicitation. These fields allow buying organizations to provide specific information pertinent to the suppliers that are interested in responding to the solicitation. Below is an example of a configurable field that could be found in a solicitation's header information.
  - **Bidder's Conference**

    Time and date set by the buying organization for a Pre-Bidder's conference. The conference details will be outlined as well as whether or not attendance is required.

Buyer Required Documents

The **Buyer Required Documents** section contains all the documents that the buying organization had issued with the solicitation. These documents contain vital information specific to the buying organization issuing the solicitation. Acceptance of these documents by the supplier organization is required in order to enter a response for the solicitation.



- **Green check** ✓

  A Green Check icon ✓ in the **Received** column indicates that the document has been accepted by your organization.

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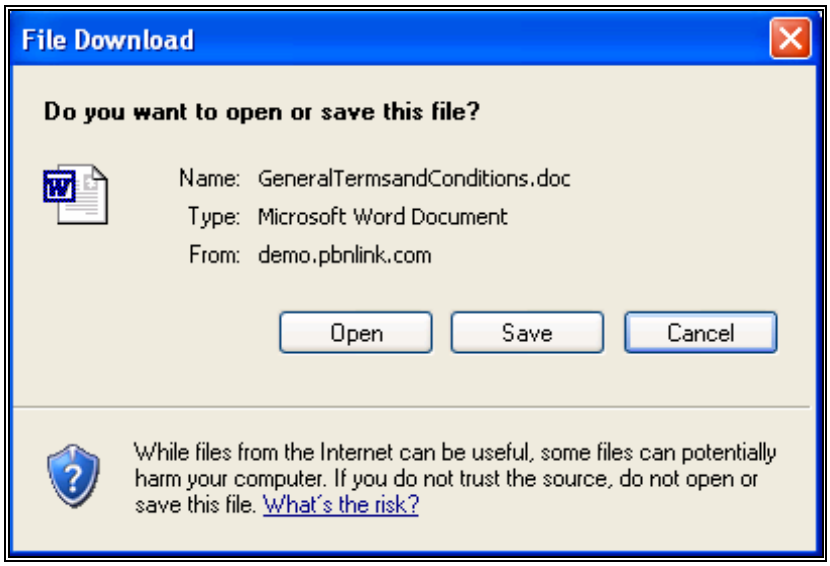
- **Red** ✖

  A Red X icon ✖ in the **Received** column indicates that the document has not been accepted by your organization.

- **Documents**

  Click the document name to review the document.

  A window will open and display downloading instructions for the document as shown below.



Note:

Downloading the Buyer Documents to your computer is recommended. The documents can be easily accessed from your computer during the response process for the solicitation. The Buyer Required Documents remain accessible for viewing at all times within the WebProcure *system.*

Select the check box beside the document name in the **Select** column.

Click Accept Accept.

Note:

You cannot respond to a solicitation without first accepting the Buyer Required Documents.

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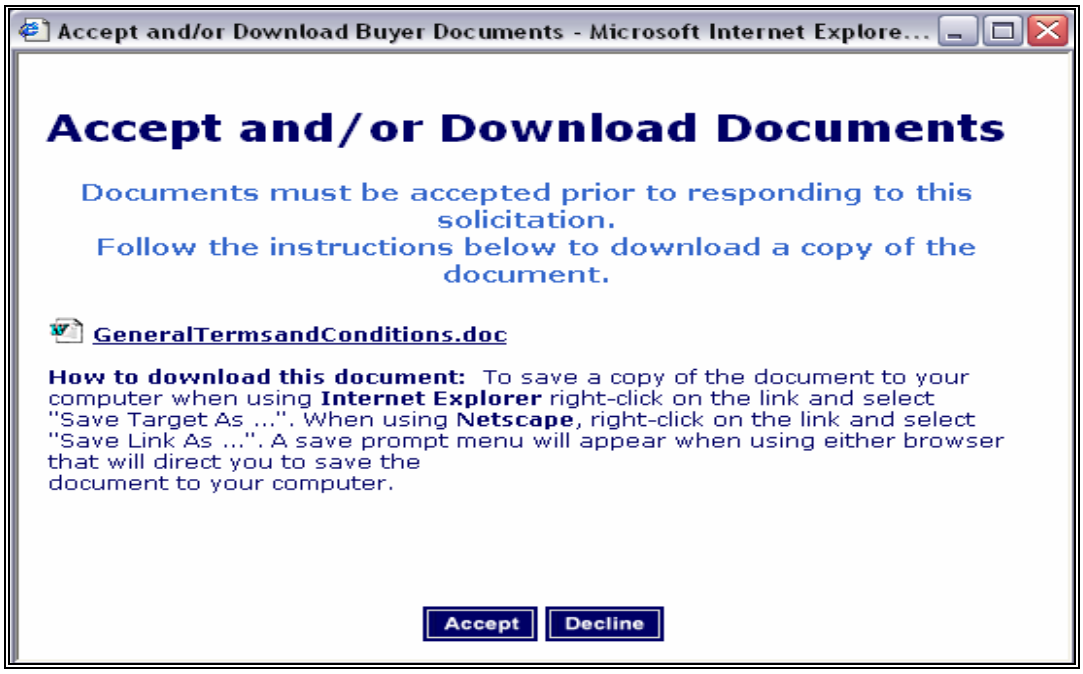
- **Actions**
  - **Review**

    Click the Review icon to review and/or download the document.

    A window will open and display downloading instructions for the document as shown below.



Click **Accept** Accept.

Note:

*You cannot respond to a solicitation without first accepting **all** Buyer Required Documents.*

- **Download**

  Click the Download icon as another option to download the required documents.

  A window will open and display downloading instructions for the document.

  Once all Buyer Required Documents have been accepted, the **Bid on Items** option is now available at the bottom of the page.

- **Bid on Items**
  - Click Bid on Items Bid on Items.
  - Click Close Close to return to the **Current Solicitation** page.

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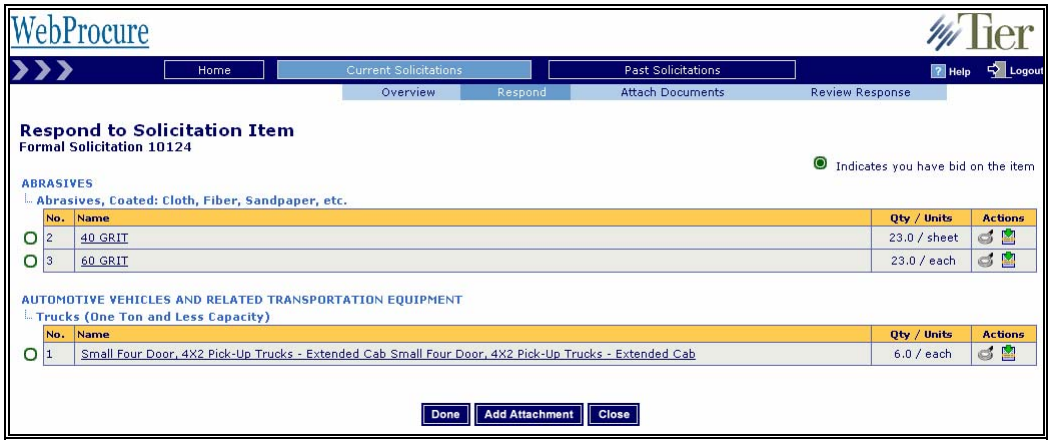
Respond to Solicitation Item(s)

After you have clicked Bid on Items Bid on Items, the **Respond to Solicitation Item** page will be open as shown below.



Listed below are the headings associated with each item on the **Respond to Solicitation Item** page.

- **No.**

  The number of the item on the solicitation.

  - **Status**

    The icon to the left of the item name displays the status of the response for the item by your supplier organization.

    - **Empty Green Circle** ○

      The empty green circle icon ○ indicates that you have not yet entered a response for the item.

    - **Full Green Circle** ◉

      The full green circle icon ◉ indicates that you have entered a response for the item.

- **Name**

  Click on the item name to display the **Item Response** page, where you can enter in a response for the Item(s).

- **Qty/Unit Size**

  Quantity lists the number of items the organization is requesting. Unit size lists the unit of measure for the requested item.

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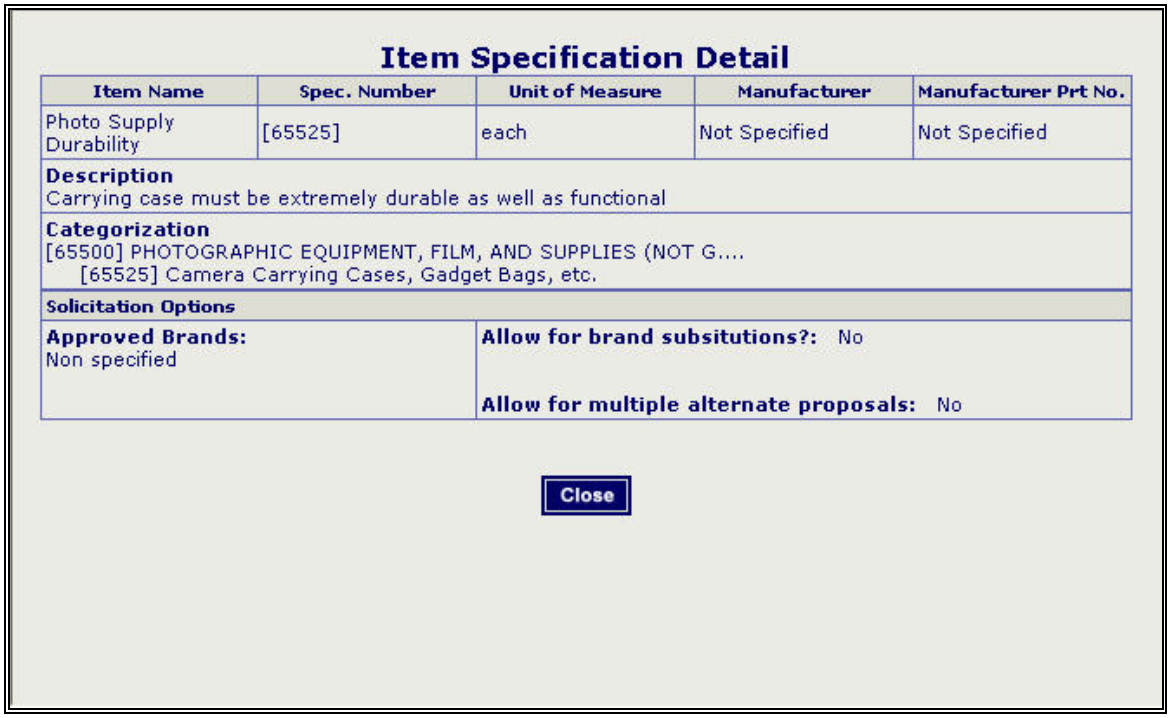
- **Actions**
  - **Item Detail**

    Click on the Item Detail icon to display a window, which includes a description for the item as shown below.



Item Specification Detail

Item Name	Spec. Number	Unit of Measure	Manufacturer	Manufacturer Prt No.
Photo Supply Durability	[65525]	each	Not Specified	Not Specified

Description
Carrying case must be extremely durable as well as functional

Categorization
[65500] PHOTOGRAPHIC EQUIPMENT, FILM, AND SUPPLIES (NOT G....
[65525] Camera Carrying Cases, Gadget Bags, etc.

Solicitation Options

Approved Brands:
Non specified

Allow for brand subsitutions?: No

Allow for multiple alternate proposals: No

Close

- **Submit/Edit your Response**

  Click the Submit/Edit your Response icon to open the **Solicitation Item** page, where you can enter a response for the item.

Enter Response for Solicitation Items

Respond to the items associated with the solicitation by one of the following methods:

- Click the item name to open the **Solicitation Items** page.

Or

- Click the Submit/Edit your Response icon to open the **Solicitation Items** page.

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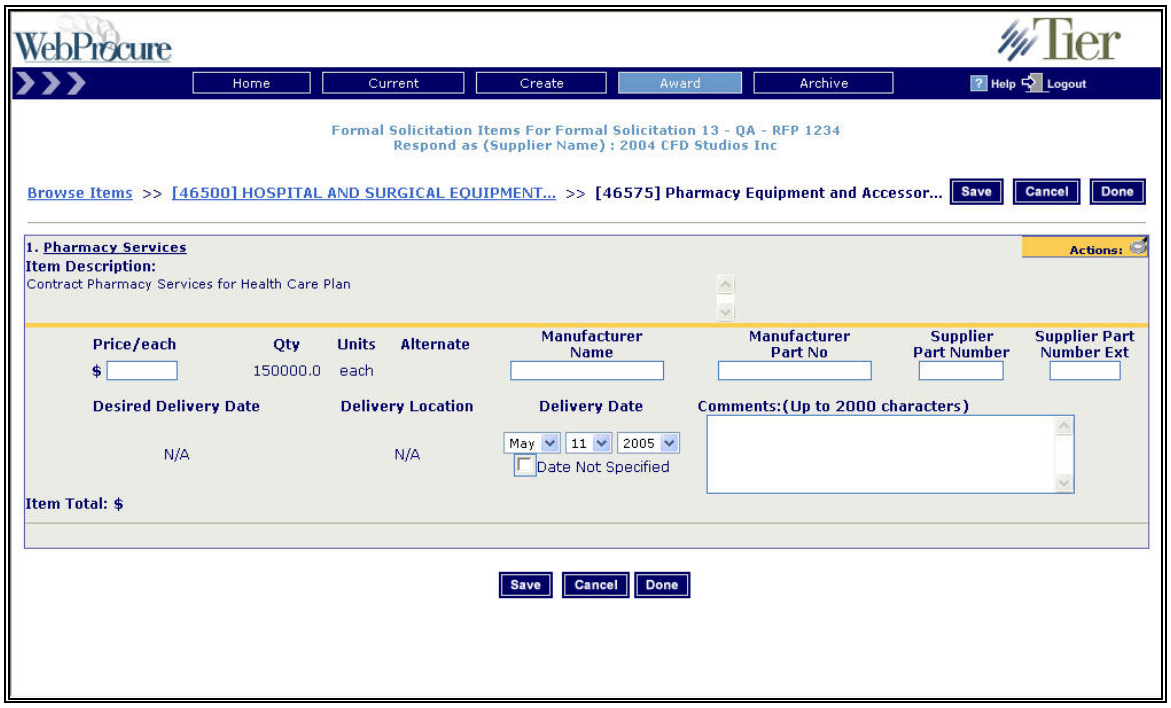
The **Solicitation Items** page is where you enter the price, brand, product number, and description for the item(s) in your response as shown below.



Listed below are all of the fields and buttons available for each item on the **Solicitation Item** page.

- **Item Name**

  The name of the item as listed in the buying organization's commodity catalog.

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Action Column Icons

- **Item Detail**

  Click the Item Detail icon to view detailed specifications for the item as shown below.

Item Specification Detail

Item Name	Spec. Number	Unit of Measure	Manufacturer	Manufacturer Part Number
64075575304	[64075575304]	dozen	Not Specified	Not Specified

Description
64075575304

Categorization
[64000] PAPER AND PLASTIC PRODUCTS, DISPOSABLE
[64075] Toilet Tissues, Paper Towels, and Toilet Seat Cove....

Solicitation Options

Requested Alternate(s):
District 1
District 2
District 3
District 4
Statewide

Allow supplier to specify substitute alternates: Yes

Allow supplier to provide proposals for multiple alternates: Yes

Close

  Click Close to exit the **Item Detail** page.

- **Item Reminder**

  Click the Item Reminder icon to open a new window that allows you to enter notes to yourself about the selected item.

Note:

*Notes entered in the **Item Reminder** window will only be visible to you.*

- **Item History**

  Click the Item History icon to open the **Solicitation History** page for the item.

- **Price/each**

  Enter the dollar amount per unit for the item.

- **Quantity**

  Indicates the number of the specific item the buying organization has requested.

- **Unit**

  Indicates the unit of measure for the selected item.

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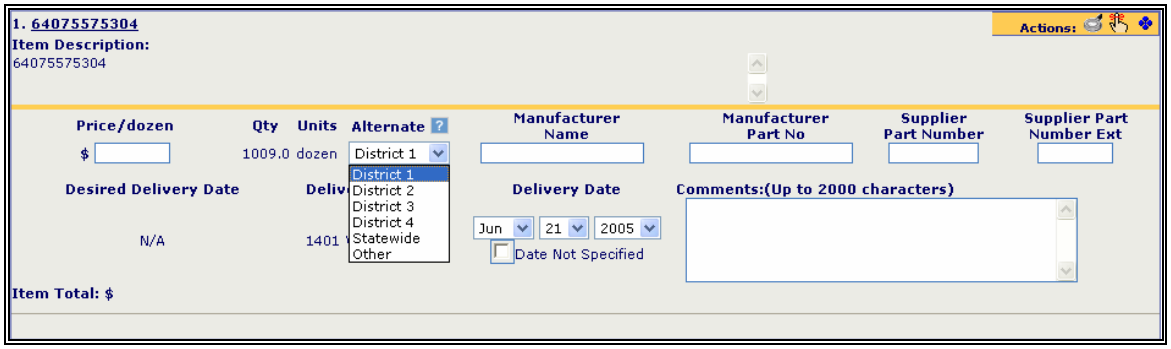
- **Alternate**

  If the organization has specified interest in more than one alternate, select from the drop-down box which alternate option you are referring to in your response as shown below.



- **Manufacturer Name**

  Enter the Manufacturer Name for the item for which you are entering a response.

  o This is an optional field.

- **Manufacturer Part Number**

  Enter the Manufacturer Part Number for the item for which you are entering a response.

  o This is an optional field.

- **Supplier Part Number**

  Enter the Supplier Part Number for the item for which you are entering a response.

  o This is an optional field.

- **Supplier Part Number Extension**

  Enter the Supplier Part Number Extension for the item for which you are entering a response.

  o This field is an optional field.

- **Delivery Date**

  Using the drop-down boxes provided, select a delivery date for the item.

  Select **Date not Specified** to make your response without indicating a delivery date.

- **Comments**

  Enter a comment in the **Comments** field if you would like to send a comment to the buying organization. This field can be used to note special offers on the items or detailed information for the product.

  Click Save [Save] to complete your response to the solicitation item(s) and return to the **Respond to Solicitation Item** page.

  Click Cancel [Cancel] to reset the information to the previous state and to return to the **Respond to Solicitation Item** page.

  Click Done [Done] to finish your item response.

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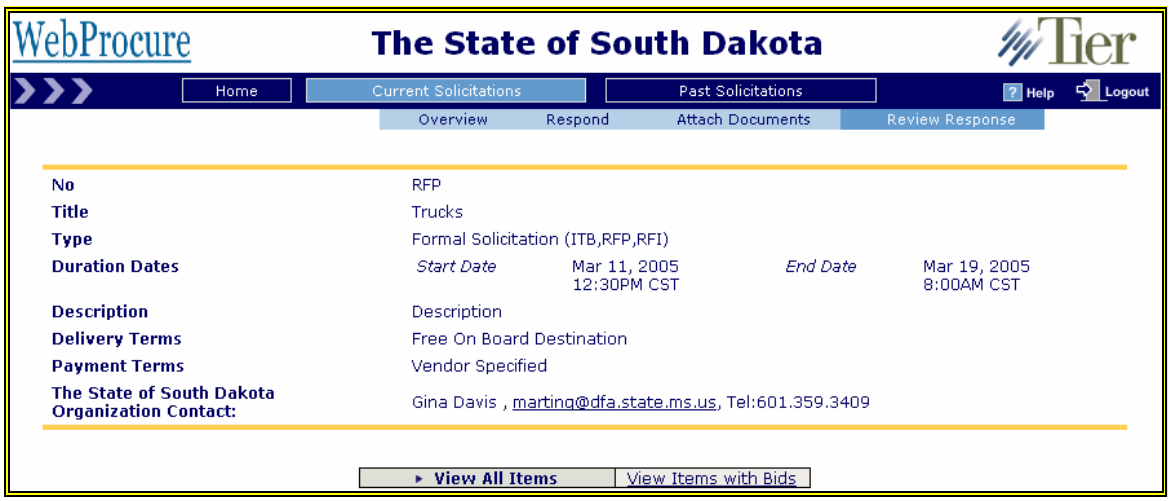
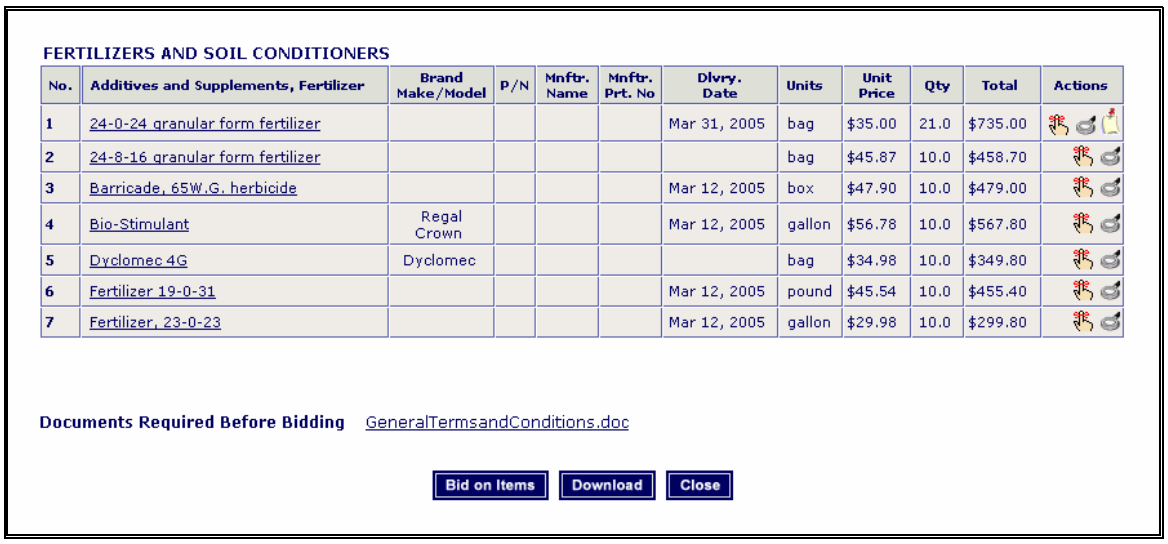
Review Response

The **Review Response** page displays information regarding the response you have entered as shown below.





You can view all of the items listed in the solicitation by clicking View All Items or you can view only the items for which you have entered a response by clicking View Items with Bids .

Click Close at the bottom of the page to return to the **Current Solicitation** page.

Subnavigation Bar

Return to a specific section of the current solicitation being responded to by clicking the desired option on the subnavigation bar of the page as shown below.

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Use the subnavigation bar throughout your response to navigate between the pages associated with the response process.

Attach Documents

For each response, you can attach documents for the buying organization's review.

Note:

You are not required to attach documents to your response. You are not limited to the number of documents you can attach to your response.

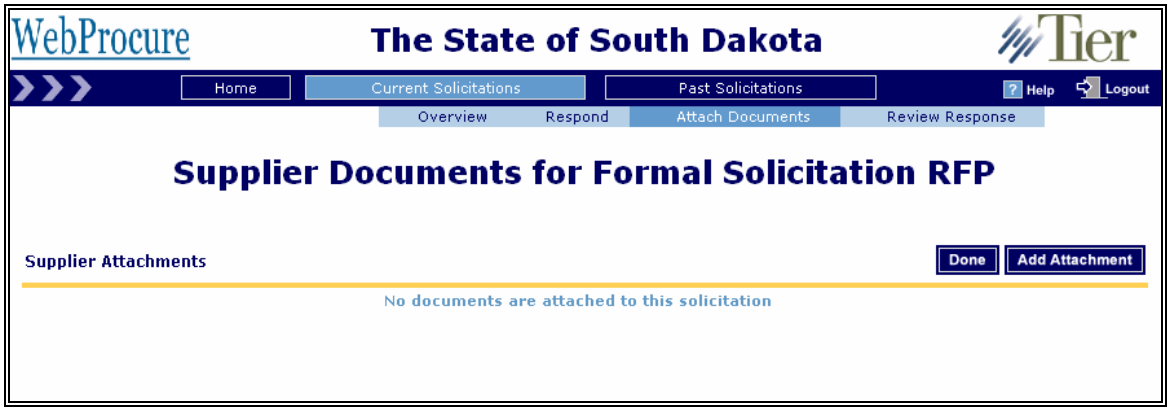
Attaching a document to your response

Click Add Attachment [Add Attachment] located at the bottom of the **Respond** page.

Or

Click Attachment Documents [Attach Documents] from the subnavigation bar.

The **Supplier Documents** page will open as shown below.



Click Add Attachment [Add Attachment] to attach a document to the solicitation response.

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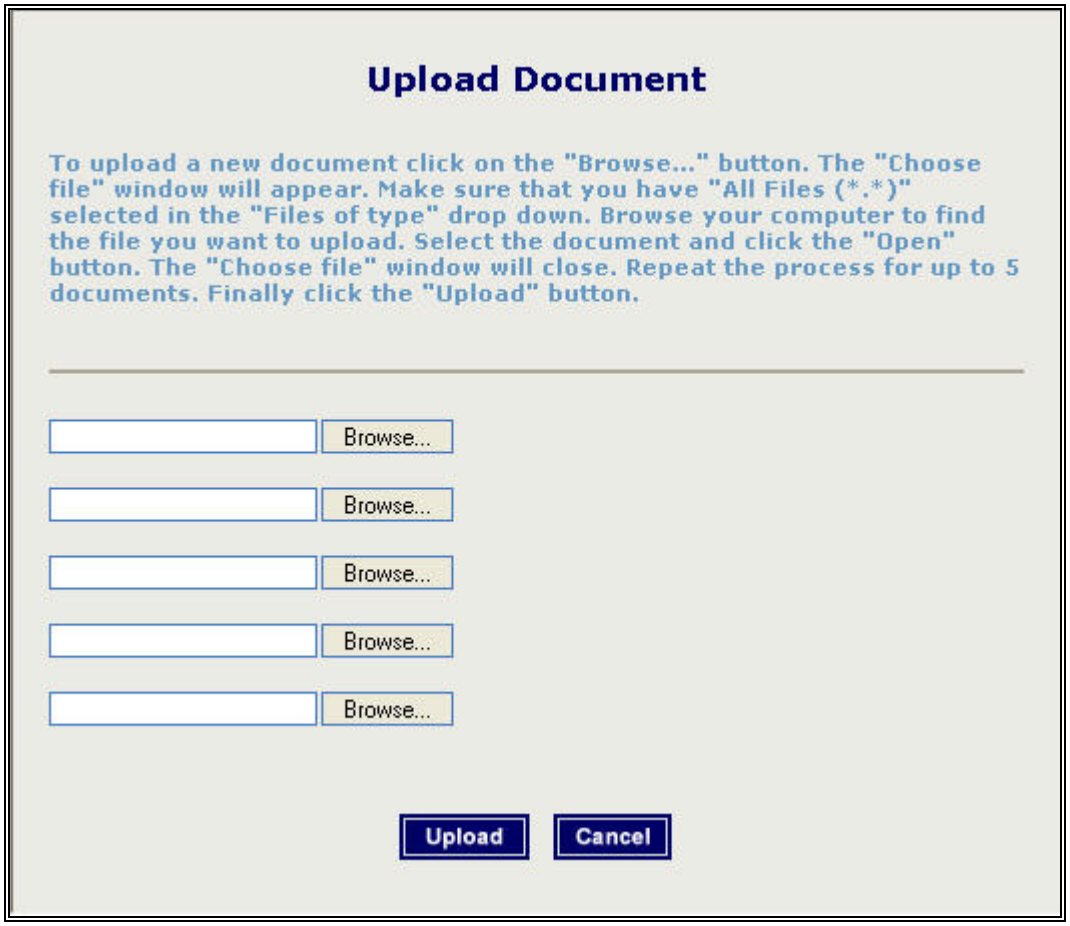
The **Upload Document** page will open as shown below.



Click **Browse** .

The File Upload menu window will appear. Select the document you want to upload from your computer to the solicitation.

Note:

Make sure that you have All Files selected in the File Type drop-down menu area so that you can see ALL of your files.

Click Upload to finish uploading your document.

Viewing existing documents

If you would like to view an existing document, click the link with the name of the document.

A new window will open, giving you directions on how to open the document for viewing.

Delete existing documents

Click the Delete icon next to a document name to delete it from the solicitation response.

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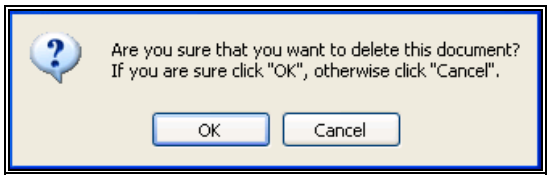
A message window will open verifying you want to delete the document as shown below.



Click **OK** OK.

Note:

Once a document is deleted, it is permanently removed. The entire upload process will have to be repeated to add the document to the solicitation again.

When you are finished reviewing your information and adding documents, click Done Done to return to the **Current Solicitation** list.

Editing Your Response

You can edit your response any time before the solicitation ends by one of the following methods.

Click the **Opp. No.** on the **Current Solicitation** page.

Or

Click the Submit/Edit Your Response icon in the **Actions** column on the **Current Solicitation** page.

The Solicitation will open to the **Overview** page.

Use the subnavigation bar to move through the pages that require editing.

Below is a description of the editable sections accesses through the subnavigation bar.

- **Overview**
  - The **Overview** page opens and displays each section of the solicitation.
  - The **Overview** page contains the **Buyer Required Documents**.

    Access the **Buyer Required Documents** for viewing or downloading by one of the following methods.

    Click on the document name.

    Or

    Click the Download icon located in the **Actions** column.

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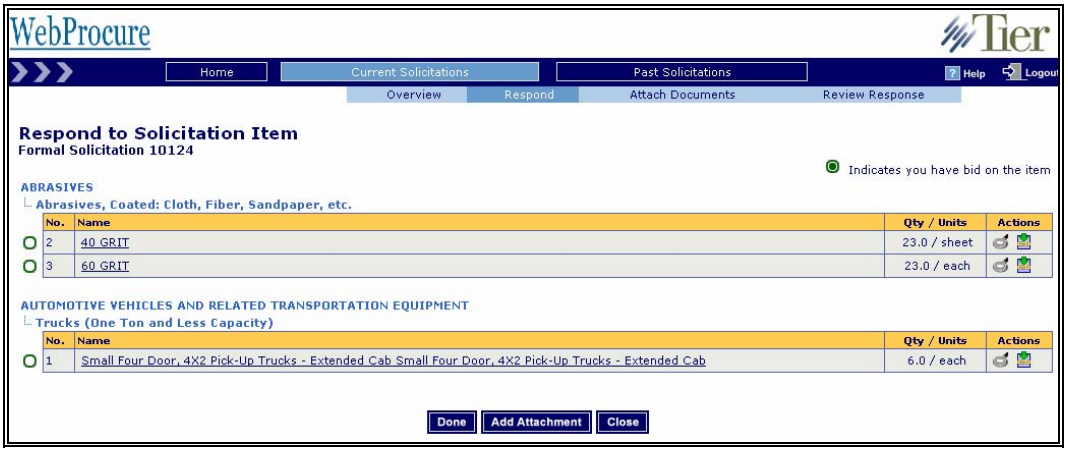
- **Respond**

The **Respond** option will open to the **Respond to Solicitation Item** page as shown below.



Click on the Item(s) name to edit your response for the item(s).

The **Solicitation Item** page will open as shown below.

Make the necessary edits to the fields provided.

Click Save to save any changes.

Click Done to return to the **Respond to Solicitation Item** page.

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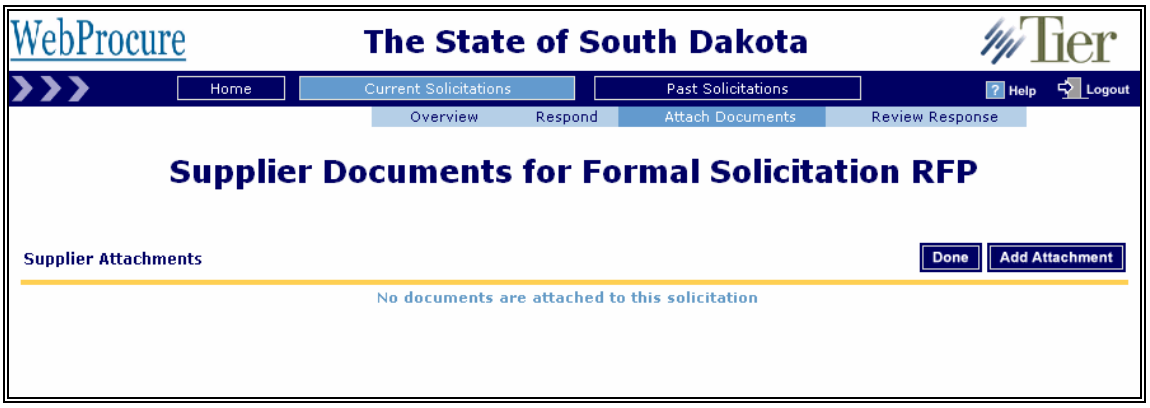
- **Attach Documents**

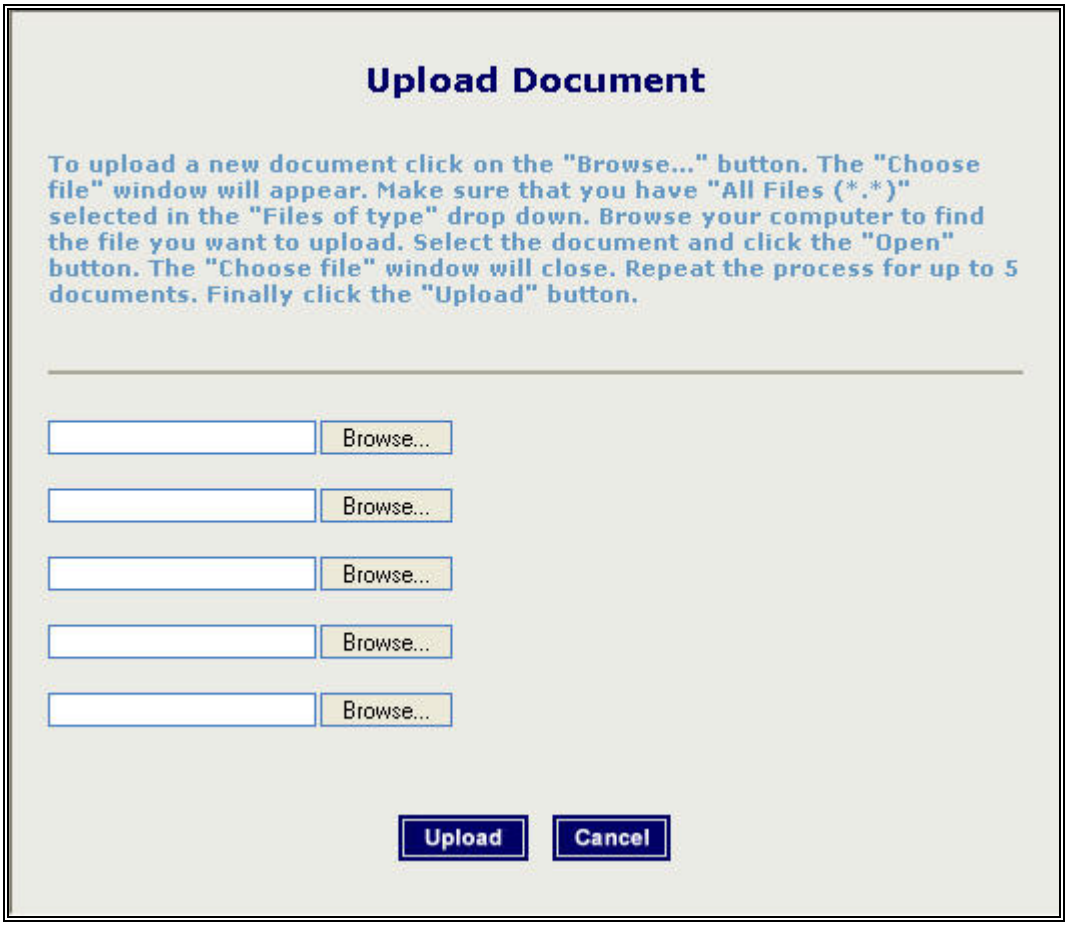
Click Attach Document Add Attachment to open the **Supplier Documents** page as shown below.



You can view attachments that have previously been attached to the solicitation response. If no documents have previously been attached to the solicitation response, then the page will be blank.

Click Add Attachment Add Attachment to attach a document to the solicitation response.

The **Upload Document** page will open as shown below.



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Click Browse Browse....

The **File Upload** menu window will open. Select the document you want to upload.

Note:

Make sure that you have All Files selected in the File Type drop-down menu area so that you can see ALL of your files.

Click Upload Upload to finish uploading your documents.

Click Done Done once you have completed attaching all desired documents.

- **Review Response** Review Response

The **Review Response** page will open and display your response to the solicitation.

Click Close Close to close the solicitation.

Click Download Download to download your response to the solicitation.

Click Bid on Items Bid on Items to make further edits to the items associated with the solicitation.

Click one of the options on the subnavigation bar to perform edits to specific areas of the solicitation.

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Past Solicitations

Click the **Past Solicitations** option

on the main navigation bar to display an overview of all the solicitations that have reached their end date and time.

The Solicitations are displayed in two lists: **Current Opportunities** and **Finalized and Award Opportunities**.

Current Opportunities lists solicitations that have passed their End Date & Time, but have not been awarded by the buying organizations.

Finalized and Awarded Opportunities list all the Formal and Informal Solicitations that have been awarded and finalized by the buying organization.

Listed below is the information associated with each solicitation.

- **Opp. No**

  Click the number listed in the **Opp. No** column beside the solicitation you would like to view.

  An overview of the original solicitation will be displayed.

- **Title**

  List the Title of the solicitation labeled by the buying organization.

- **Status**

  - **Not Viewed**

    The **Not Viewed** status indicates that the solicitation summary has not been viewed by your organization.

  - **Responded**

    The **Responded** status indicates that a response was submitted for this solicitation by your organization.

  - **Viewed**

    The **Viewed** status indicates that the solicitation summary and/or the award report have been reviewed by your organization.

- **Start Date & Time**

  Start Date is the date when the solicitation was available for supplier review and response.

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- **End Date & Time**

  End Date is the date the solicitation closed to supplier response.

- **Buyer Status**

  Buyer Status indicates the status of the solicitation in the award process.

  - **Under Review**

    The **Under Review** status indicates that the solicitation is in the evaluation period of the award process.

  - **Ended**

    The **Ended** status indicates that the solicitation's end date and time has past and the solicitation is closed. Supplier responses can no longer be accepted. The solicitation has not yet entered the evaluation period of the award process.

  - **Awarded**

    The **Awarded** status indicates that the buying organization has made an award for some or all of the items that are part of the solicitation.

- **Actions**

  - **View Solicitation Summary**

    An overview of the original solicitation will be displayed.

  - **Award Report**

    Access the Award Report for a Finalized and Awarded Opportunity.

  - **Print**

    The print feature is available to print the solicitation.

View Solicitation Award Report

In the **Finalized and Awarded Opportunities** section of the page, the Award Report icon will be available in the **Action** column for the solicitation.

Note:

If the Award Report icon *is not available for a solicitation, then the buying organization responsible for the solicitation did not publish the award information for public view. It is at the discretion of the buying organization to publish any and all information for public view.*

Direct all inquires regarding a finalized solicitation that does not have a published Award report to the contact listed on the solicitation for the buying organization. You can locate the buying organizations contact by clicking the **Opp. No** for the solicitation.

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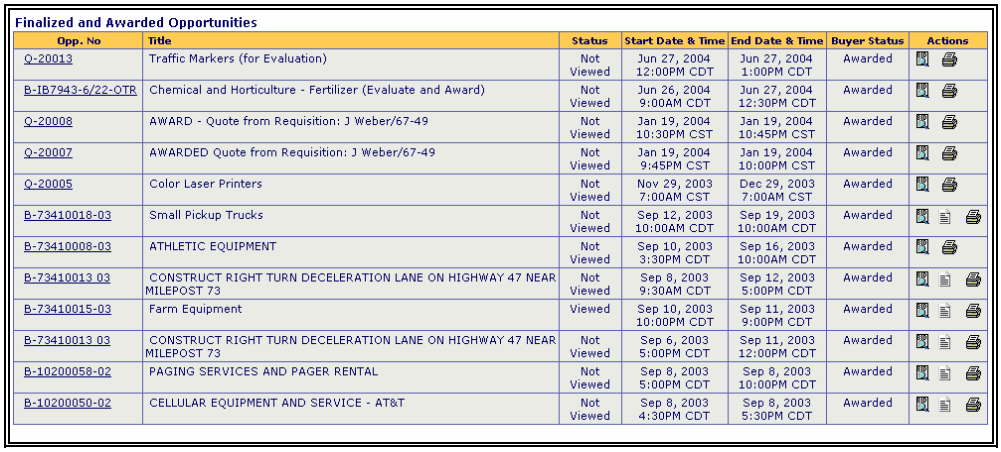
The **Solicitation Overview** page will open.

The contact information for the purchaser will be listed in the main contact section.

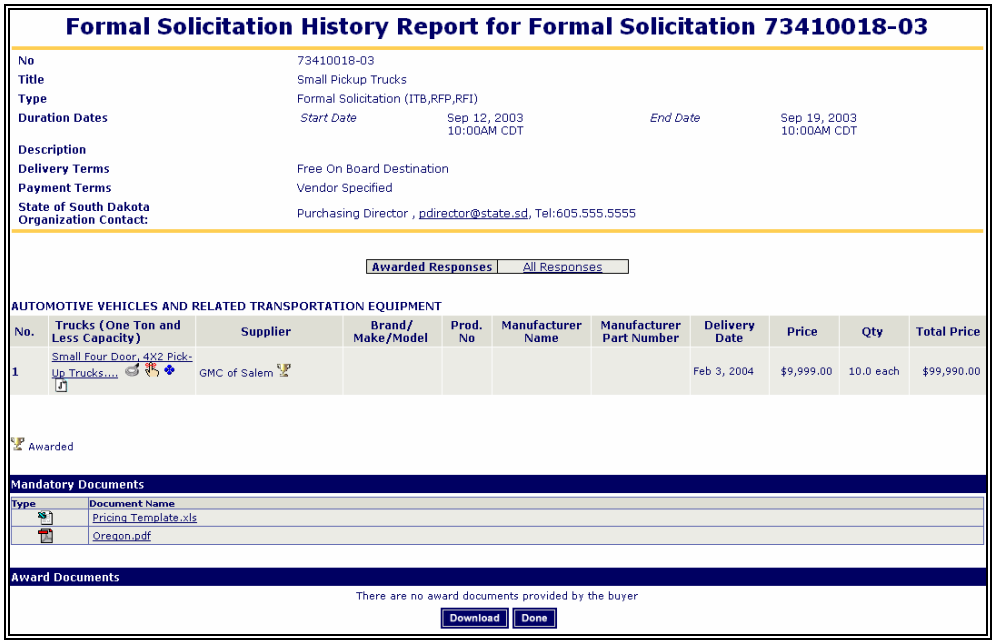


Finalized and Awarded Opportunities

Opp. No	Title	Status	Start Date & Time	End Date & Time	Buyer Status	Actions
Q-20013	Traffic Markers (for Evaluation)	Not Viewed	Jun 27, 2004 12:00PM CDT	Jun 27, 2004 1:00PM CDT	Awarded	
B-IB7943-6/22-OTR	Chemical and Horticulture - Fertilizer (Evaluate and Award)	Not Viewed	Jun 26, 2004 9:00AM CDT	Jun 27, 2004 12:30PM CDT	Awarded	
Q-20008	AWARD - Quote from Requisition: J Weber/67-49	Not Viewed	Jan 19, 2004 10:30PM CST	Jan 19, 2004 10:45PM CST	Awarded	
Q-20007	AWARDED Quote from Requisition: J Weber/67-49	Not Viewed	Jan 19, 2004 9:45PM CST	Jan 19, 2004 10:00PM CST	Awarded	
Q-20005	Color Laser Printers	Not Viewed	Nov 29, 2003 7:00AM CST	Dec 29, 2003 7:00AM CST	Awarded	
B-73410018-03	Small Pickup Trucks	Not Viewed	Sep 12, 2003 10:00AM CDT	Sep 19, 2003 10:00AM CDT	Awarded	
B-73410008-03	ATHLETIC EQUIPMENT	Not Viewed	Sep 10, 2003 3:30PM CDT	Sep 16, 2003 10:00AM CDT	Awarded	
B-73410013 03	CONSTRUCT RIGHT TURN DECELERATION LANE ON HIGHWAY 47 NEAR MILEPOST 73	Not Viewed	Sep 8, 2003 9:30AM CDT	Sep 12, 2003 5:00PM CDT	Awarded	
B-73410015-03	Farm Equipment	Viewed	Sep 10, 2003 10:00PM CDT	Sep 11, 2003 9:00PM CDT	Awarded	
B-73410013 03	CONSTRUCT RIGHT TURN DECELERATION LANE ON HIGHWAY 47 NEAR MILEPOST 73	Not Viewed	Sep 6, 2003 5:00PM CDT	Sep 11, 2003 12:00PM CDT	Awarded	
B-10200058-02	PAGING SERVICES AND PAGER RENTAL	Not Viewed	Sep 8, 2003 5:00PM CDT	Sep 8, 2003 10:00PM CDT	Awarded	
B-10200050-02	CELLULAR EQUIPMENT AND SERVICE - AT&T	Not Viewed	Sep 8, 2003 4:30PM CDT	Sep 8, 2003 5:30PM CDT	Awarded	

If available, click on the Award Report icon for the solicitation that you wish to view.

The **Solicitation History Report** page will open as shown below.



Formal Solicitation History Report for Formal Solicitation 73410018-03

No	73410018-03
Title	Small Pickup Trucks
Type	Formal Solicitation (ITB,RFP,RFI)
Duration Dates	*Start Date* Sep 12, 2003 10:00AM CDT *End Date* Sep 19, 2003 10:00AM CDT
Description	
Delivery Terms	Free On Board Destination
Payment Terms	Vendor Specified
State of South Dakota Organization Contact:	Purchasing Director , pdirector@state.sd, Tel:605.555.5555

Awarded Responses | All Responses

AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT

No.	Trucks (One Ton and Less Capacity)	Supplier	Brand/ Make/Model	Prod. No	Manufacturer Name	Manufacturer Part Number	Delivery Date	Price	Qty	Total Price
1	Small Four Door, 4X2 Pick-Up Trucks....	GMC of Salem					Feb 3, 2004	$9,999.00	10.0 each	$99,990.00

Awarded

Mandatory Documents

Type	Document Name
	Pricing Template.xls
	Oregon.pdf

Award Documents

There are no award documents provided by the buyer

Download Done

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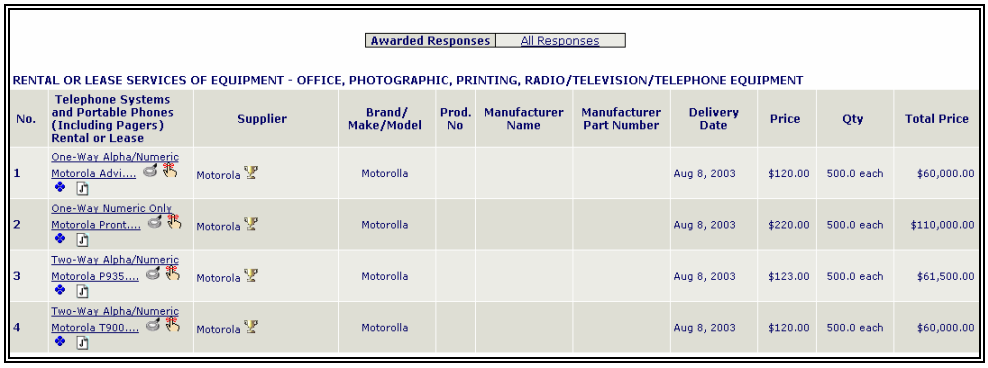
The **Response** section of the page has two available views. Below is an example of each view.

The default view is **Awarded Responses**. This view displays the supplier organization that won the award for each item listed for the solicitation as shown below.



Awarded Responses | All Responses

RENTAL OR LEASE SERVICES OF EQUIPMENT - OFFICE, PHOTOGRAPHIC, PRINTING, RADIO/TELEVISION/TELEPHONE EQUIPMENT

No.	Telephone Systems and Portable Phones (Including Pagers) Rental or Lease	Supplier	Brand/ Make/Model	Prod. No	Manufacturer Name	Manufacturer Part Number	Delivery Date	Price	Qty	Total Price
1	One-Way Alpha/Numeric Motorola Advi....	Motorola	Motorola				Aug 8, 2003	$120.00	500.0 each	$60,000.00
2	One-Way Numeric Only Motorola Pront....	Motorola	Motorola				Aug 8, 2003	$220.00	500.0 each	$110,000.00
3	Two-Way Alpha/Numeric Motorola P935....	Motorola	Motorola				Aug 8, 2003	$123.00	500.0 each	$61,500.00
4	Two-Way Alpha/Numeric Motorola T900....	Motorola	Motorola				Aug 8, 2003	$120.00	500.0 each	$60,000.00

The Award icon is displayed beside the supplier name for each item awarded in the section.

Item Icons:

- **Item Detail**

  Click the Item Detail icon to view buyer placed specifications for the item.

- **Item Reminders**

  Click the Item Reminder icon to display any notes that were entered by you during the response process for the item. These notes are only viewable to you.

- **Item History**

  Click the Item History icon to display the Solicitation History of the item with the buying organization that issued the solicitation you are viewing.

- **Comment**

  Click the Comment icon to view the comment that you included during the response process to the supplier regarding the item.

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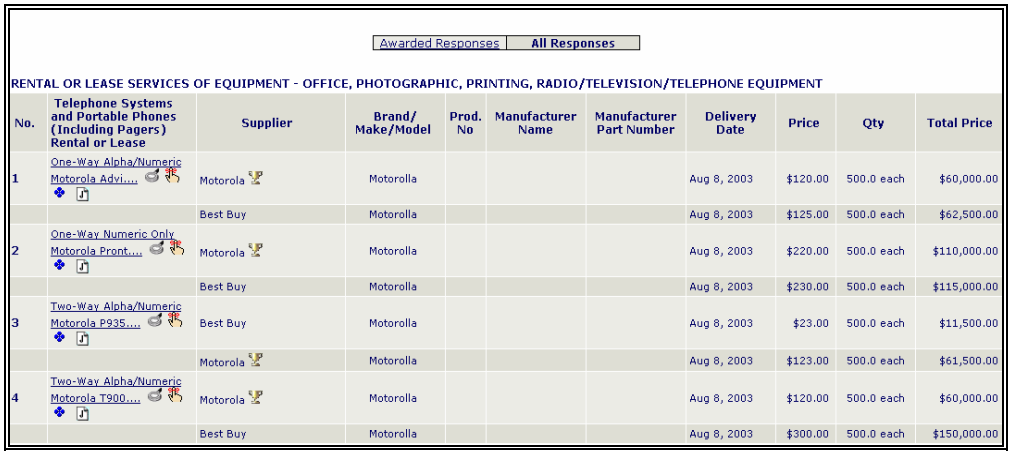
All Responses is the second view available. Click All Responses [All Responses] to view all the supplier responses submitted for the items of the solicitation.



Awarded Responses | All Responses

RENTAL OR LEASE SERVICES OF EQUIPMENT - OFFICE, PHOTOGRAPHIC, PRINTING, RADIO/TELEVISION/TELEPHONE EQUIPMENT

No.	Telephone Systems and Portable Phones (Including Pagers) Rental or Lease	Supplier	Brand/ Make/Model	Prod. No	Manufacturer Name	Manufacturer Part Number	Delivery Date	Price	Qty	Total Price
1	One-Way Alpha/Numeric Motorola Advi....	Motorola	Motorola				Aug 8, 2003	$120.00	500.0 each	$60,000.00
		Best Buy	Motorola				Aug 8, 2003	$125.00	500.0 each	$62,500.00
2	One-Way Numeric Only Motorola Pront....	Motorola	Motorola				Aug 8, 2003	$220.00	500.0 each	$110,000.00
		Best Buy	Motorola				Aug 8, 2003	$230.00	500.0 each	$115,000.00
3	Two-Way Alpha/Numeric Motorola P935....	Best Buy	Motorola				Aug 8, 2003	$23.00	500.0 each	$11,500.00
		Motorola	Motorola				Aug 8, 2003	$123.00	500.0 each	$61,500.00
4	Two-Way Alpha/Numeric Motorola T900....	Motorola	Motorola				Aug 8, 2003	$120.00	500.0 each	$60,000.00
		Best Buy	Motorola				Aug 8, 2003	$300.00	500.0 each	$150,000.00

The **Award** icon is displayed beside the supplier name to represent the award for each item.

Item Icons

- **Item Detail**

  Click the Item Detail icon to view buyer placed specifications for the item.

- **Item Reminders**

  Click the Item Reminder icon to display any notes that were entered by you during the response process for the item. These notes are only viewable to you.

- **Item History**

  Click the Item History icon to display the Solicitation History of the item with the buying organization that issued the solicitation you are viewing.

- **Comment**

  Click the Comment icon to view the comment that you included during the response process to the supplier regarding the item.

Opportunity Management

Edit Region Information

Click **Opportunity Management** on the **Home** page.

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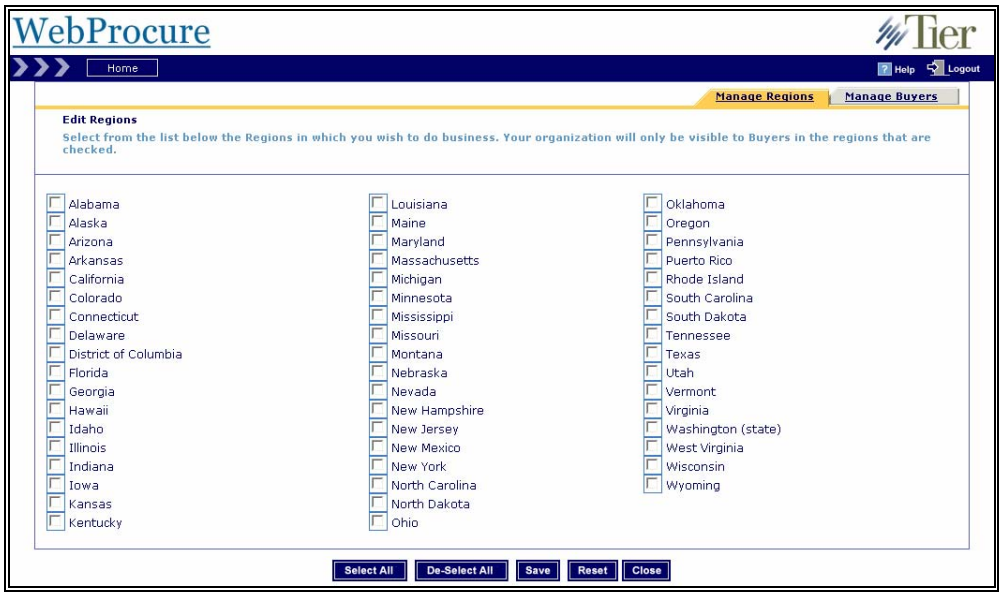
The default view is the **Manage Regions** page as shown below.



Listed are all the regions that your organization can select to show an interest in conducting business with through the *WebProcure* system.

Select the check box next to the region in which you are interested in conducting business.

Click Select All to select all of the regions at once.

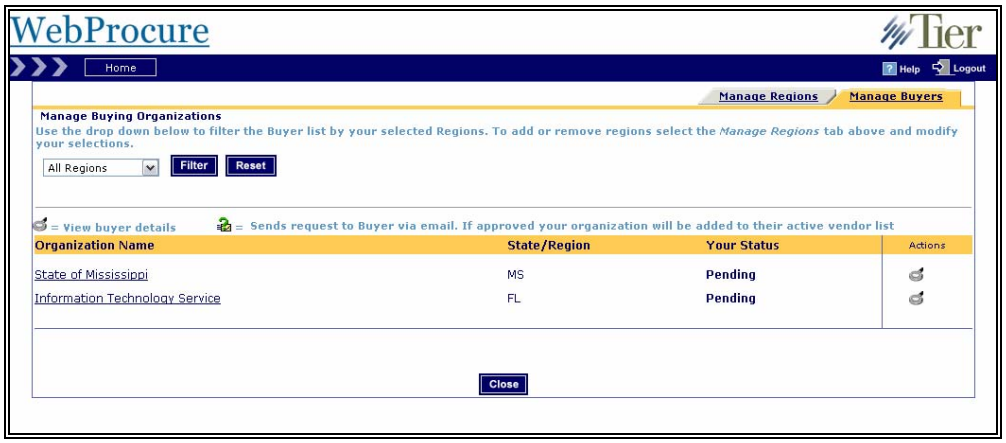
Click De-Select All to deselect all of the selected regions at once.

Click Save to save your changes.

Click Reset to reset your regions to the previously saved version.

Manage Buyers

Select the **Manage Buyers** tab to view the buying organization(s) that your organization can request to do business with through the *WebProcure* system.



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Select from the region(s) to view all the registered buying organizations from which your organization would like to receive solicitations*WebProcure*.

1. Click the drop-down box.
2. Select the region.
3. Click Filter .

A list of the buyers within the selected region(s) will display.

Listed below is the information shown for each organization.

- **Organization Name**
  - The name of the buyer organizations available in the region(s) you selected will appear.
  - Click the name of the organization to view their contact information.
- **State/Region**
  - Indicates the region(s) or state(s) the buyer organization is located in.
- **Status**
  - **No Request**

    No Request Status indicates that you have not yet requested to do business with the organization through the *WebProcure* system.
  - **Approved**

    Approved Status indicates that the buying organization has approved you as a vendor.
  - **Denied**

    Denied Status indicates that the organization has denied your request to do business with them through the *WebProcure* system.
  - **Pending**

    Pending Status indicates that the organization has yet to approve you to do business with them.
- **Actions**
  - **Request Icon**

    Click the Request icon to send a request to the buying organization. This request will alert the buying organization via e-mail that your supplier organization would like to conduct business with them through the *WebProcure* system.
  - **Buyer Details Icon**

    Click the Buyer Details icon to view the contact information for the buying organization.

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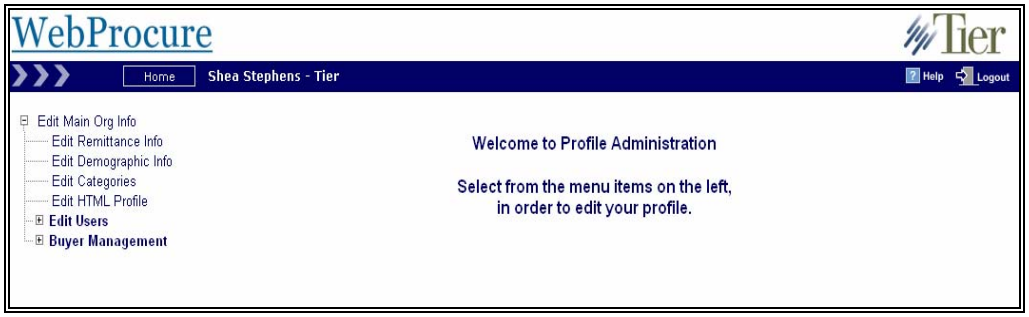
Profile Management

Click the **Profile Management** option on the **Home** page.



The **Profile Administration** Menu Tree will open in the left frame of the page. A brief description of each menu item is below. A more detailed description of each item follows:

- **Edit Main Org Info**

  View all your organization's contact information to make updates or verify information.

- **Edit Remittance Info**

  Access your organization's Remittance Address to make changes or verify information.

- **Edit Demographic Information**

  Access your organization's Demographic information to make changes or verify information.

- **Edit Categories**

  Access the list of Commodity Categories that are assigned to your organization within the *WebProcure* system. Edits can be made to your organization's commodity categories at any time.

- **Edit HTML Profile**

  Create your own promotional page using this tool to be displayed to buying organizations through the *WebProcure* system.

- **Edit Users**

  Manage your organization's user profiles within the *WebProcure* system: reset passwords, add new users, assign privileges, and update contact information.

- **Buyer Management**

  Manage the buyer organizations available within the system. You can add new Buyer Accounts; obtain contact information for current buying organizations assigned to your organization, view Agency Specific information and Account Codes associated with your organization.

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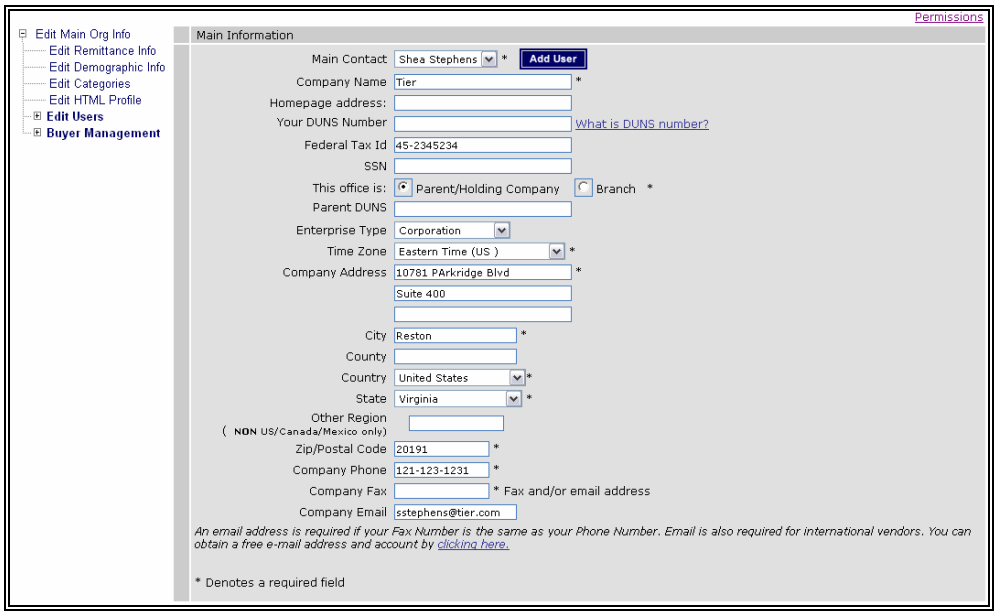
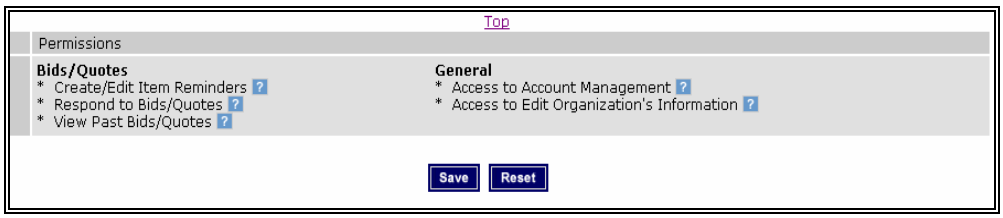
Edit Main Organization Info

Click the **Edit Main Org Info** option from the menu tree located in the left frame of the page.

The **Main Information** page will open in the right frame of the page as shown below.





Main Information

All of your organization's general information is captured on the **Main Information** page.

Required information is noted with an asterisk *****.

Enter any updated or additional information regarding your organization in the desired field.

Click Save to save the changes.

Click Reset to return the changes to their previous settings.

Permissions

Listed below are all of the permissions used in *WebProcure* Administration of Supplier Organizations.

- **Bid/Quotes**
  - **Create/Edit Item Reminders**

    This permission allows users to create and edit line item reminders.

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- **Respond to Bids/Quotes**

  This permission allows users to respond to Formal and Informal Solicitations.

- **View Past Bids/Quotes**

  This permission allows users to view finalized or closed solicitations.

- **General**

  - **Access to Account Management**

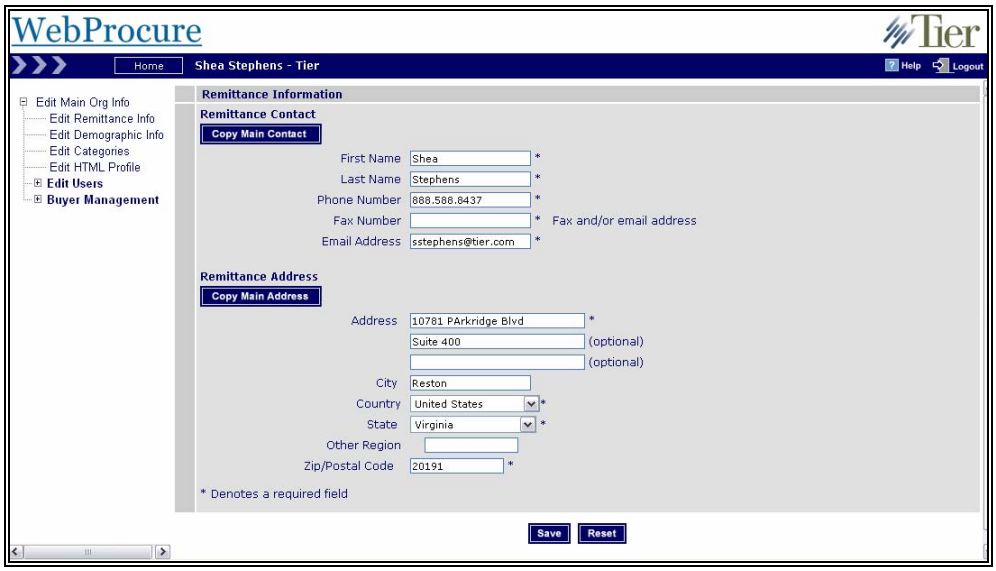
    This permission allows the organization's user access to the **Account Management** Module where they can edit buyer account codes and specify the region(s) in which the organization wishes to do business.

  - **Access to Edit Organization's Information**

    This permission allows the user to add new users to the supplier organization and edit both user and organization information.

Remittance Information

Click the **Edit Remittance Info** option from the menu tree located in the left frame of the page. Your remittance information will be displayed in the right frame of the screen as shown below.



Enter your supplier organization's remittance information.

The required information is noted with an asterisk *.

Or

Click Copy Main Contact and Copy Main Address to copy the Main Contact and Main Address from your **Main Organization** section to your remittance information.

Click Save to save your changes.

Click Reset to clear any of the changes you made to your **Remittance** profile.

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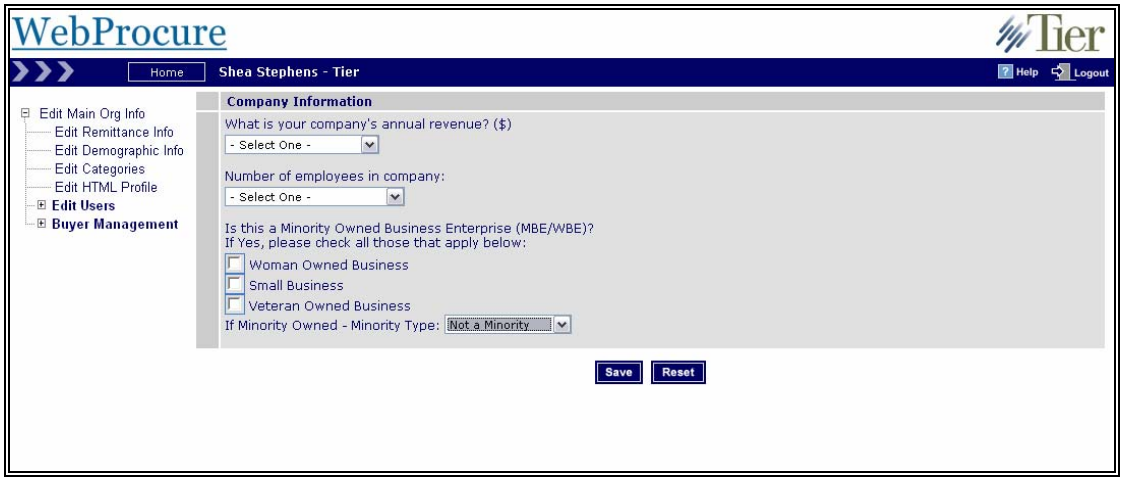
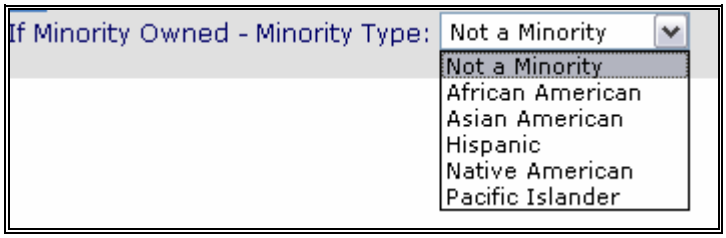
Demographic Information

Click the **Edit Demographic Info** option from the menu tree located in the left frame of the page. Your organization's information will be displayed in the right frame of the page as shown below.





Select from the drop-down menu to choose your company's annual revenue and the number of employees in your company.

Indicate a Minority-Owned Business by selecting the check box next to Woman-Owned Business, Small Business, or Veteran-Owned Business, if your company qualifies under one of the categorizations, or by using the drop-down box to select the minority type for a Minority-Owned business.

Click Save to save your changes.

Click Reset to clear any of the changes you made to your Demographic profile.

Edit Categories

Buying organizations use commodity classification codes to identify suppliers for specific items or services and to provide notices of new solicitations. If you do not assign the commodity categories that your organization provides, you will not receive automatic notices of new solicitations.

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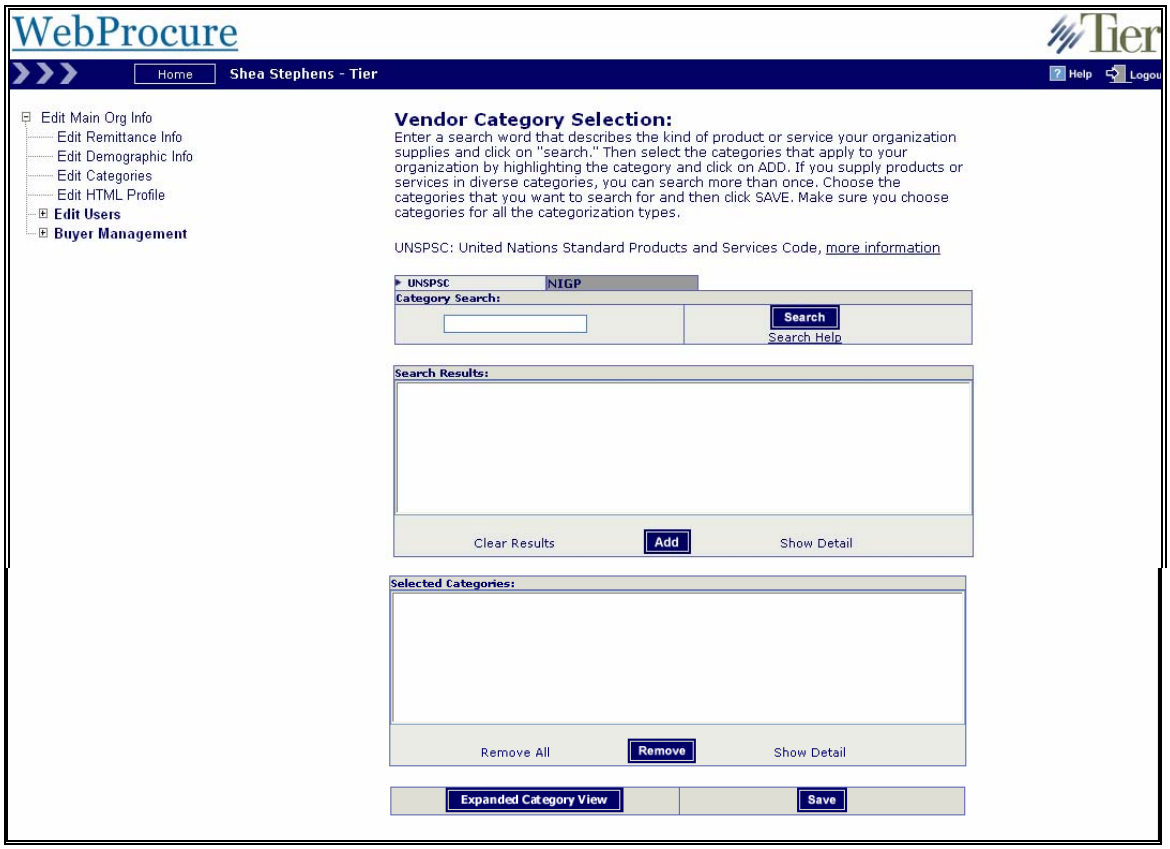
Click the **Edit Categories** option from the menu tree located in the left frame of the page. The **Vendor Category Selection** page will be displayed in the right frame of the page as shown below.



There are two commodity codes available to categorize your organization, UNSPSC and NIGP. The **UNSPSC** commodity code is the default page on the **Vendor Category Selection** page. You can easily change the commodity code to categorize your supplier organization by clicking on the button representing the code that you desire as seen below.

Enter in a keyword in the Category Search section that describes the product or service that your organization provides.

Click Search

.

The results of the search will appear in the **Search Results** section.

Click on the category name(s) that describes the products and/or services that your organization provides.

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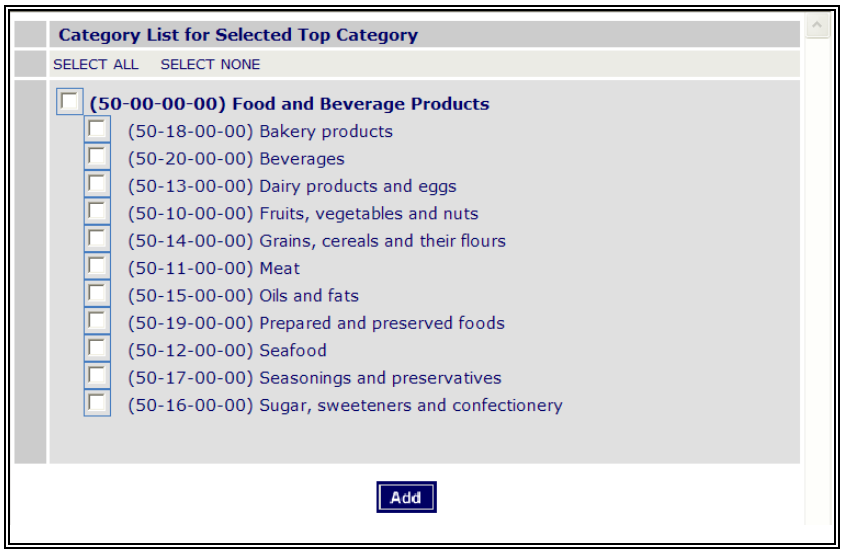
Click Add Add.

A new window will open showing the **Category List for the Selected Top Category** as shown below.



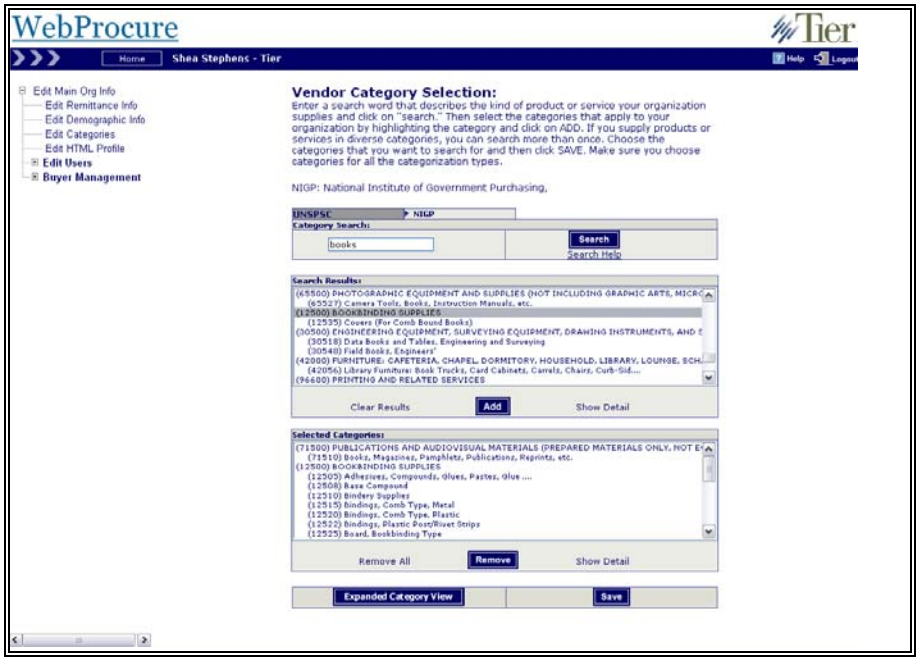
Select the check box beside the **Top Category** if all the categories listed in the window represent commodities supplied by your organization.

Or

Click only the subcategories that represent the commodities supplied by your organization.

Click Add Add at the bottom of the window to return to the **Vendor Category Selection** page.

The commodity categories that you have just added will now appear in the **Selected Categories** section of the page as shown below.



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You can repeat the search process with as many keywords as you would like to ensure that you have all the available commodity codes assigned to your organization that are available.

Click Save Save at the bottom of the page to save your changes.

Click Expanded Category View Expanded Category View to view all the commodity categories assigned to your organization under the current commodity code.

Repeat the categorization process for both **UNSPSC** and **NIGP** codes.

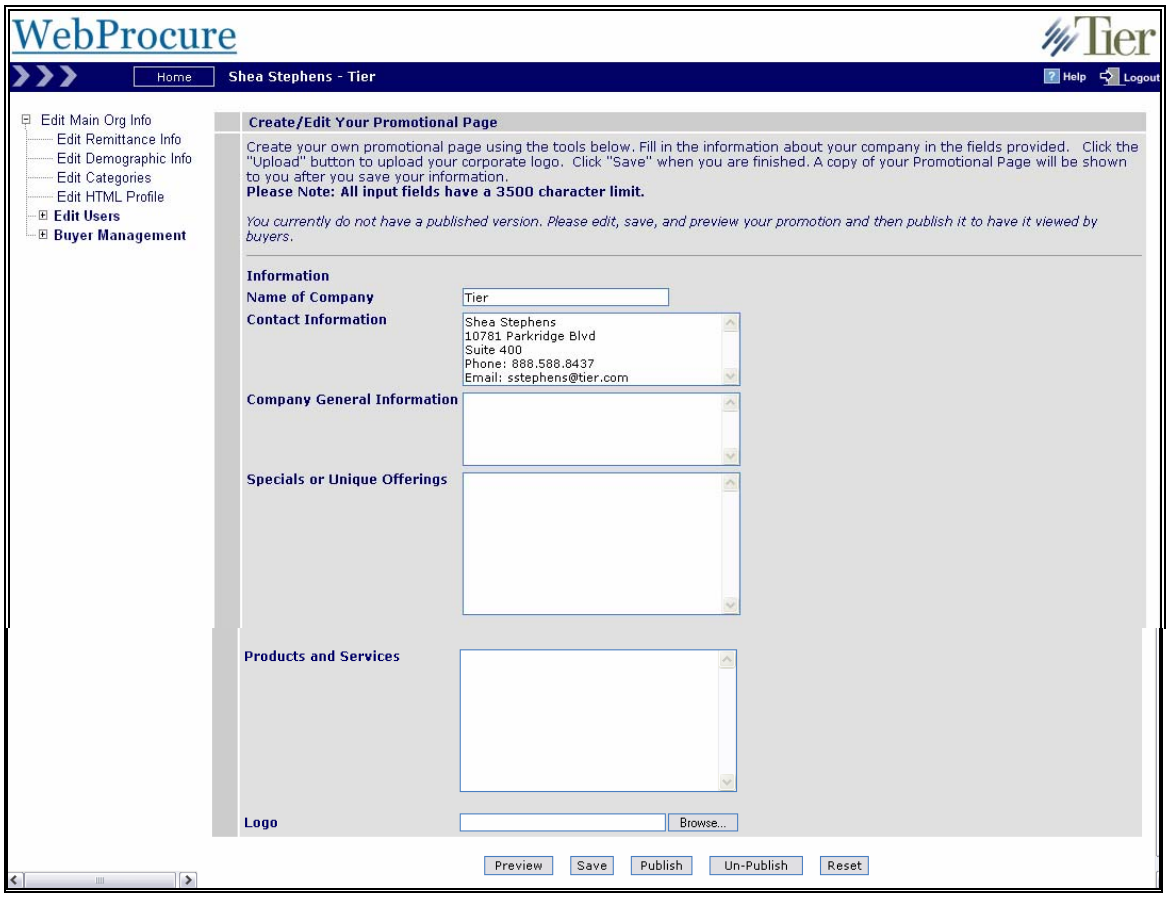
Edit HTML Profile

Create your own promotional page using this tool to be displayed to buying organizations through the *WebProcure* system.

The HTML Profile allows a supplier organization to provide customer-focused information to the buying organization through their profile. This information will be displayed to buying organizations whenever the buying organization clicks on the supplier name or the Supplier Information icon within *WebProcure*.

Click the **Edit HTML Profile** option from the menu tree in the left frame of the page.

The **Create/Edit Your Promotional Page** will open as shown below.



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A description and instructions for each available field is below.

- **Name of Company**

  Enter in your organization's name.

- **Contact Information**

  Enter in the details of your organization to be displayed to the buying organizations when they require additional information throughout the solicitation process.

- **Company General Information**

  Enter in general company information that you would like to display to the buying organizations throughout the system.

- **Specials or Unique Offerings**

  This field provides the supplier the opportunity to display special or unique offerings to buying organizations. This is a great field to include any information that would separate your supplier organization from other supplier organizations within the system.

- **Products and Services**

  Include a description of the products and services that your company provides to the buying organizations.

- **Logo**

  Upload your company's logo to be displayed along with all your supplier organization's profile through the system. The logo feature allows you an opportunity to visually enhance your organization's profile to the buying organizations.

  Click Browse

.

  The **File Upload** menu box will appear. Select the document you want to upload.

Note:

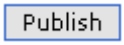
Make sure that you have All Files selected in the File Type drop-down menu area so that you can see ALL of your files. Your logo should be in a .JPEG or .GIF file format.

  Click Upload

to finish uploading your organizations logo.

Click Preview

to preview how your promotional page will appear to the buying organization within the system.

Click Publish 

to publish the created promotional page into the *WebProcure* system.

You can make edits to the **Promotional** page at any time by clicking Un-Publish

. Edits can now be made to any available fields. Once your edits are complete, click Publish

to once again display the **Promotional** page to the buying organizations within the *WebProcure* system.

Click Save

to save the changes on your organizations **Promotional** page.

Click Reset

to clear any of the changes you made to your **Promotional** page.

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Edit Users

Click the **Edit Users** option from the menu tree located in the left frame of the page.

Click the user's name. Information associated with the user's name will appear in the right frame of the screen.

User Information

The user's contact information is available in this section.

The required information fields are noted with an asterisk *.

- **User Name/Password**

  The **User Name** field is not an editable field. Once a user name is established for a user in the system, this unique user name cannot be changed.

  A user's password can be changed or reset at any time. To change a user's password, type the new password in the **Password** and **Verify Password** fields. The **Password** field is case sensitive. Passwords have to be at least five characters in length, and cannot contain the user name or the word password in them.

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Permissions

Listed below are all of the permissions available for assignment to user profiles:

- **Bid/Quotes**
  - **Create/Edit Item Reminders**

    This permission allows users to create and edit line item reminders
  - **Respond to Bids/Quotes**

    This permission allows users to responds to Formal and Informal Solicitations.
  - **View Past Bids/Quotes**

    This permission allows users to view finalized or closed solicitations.
- **General**
  - **Access to Account Management**

    This permission allows the organization's user access to the **Account Management** module where they can edit buyer account codes and specify the region(s) in which the organization wishes to do business.
  - **Access to Edit Organization's Information**

    This permission allows users to add new users and edit both user and organization information.
- **Status**
  - **Active**

    When a user has logged in for the first time and changed their password their status is set to **Active**.
  - **Suspended**

    You can set a user's status to **Suspended** if they are no longer able to use the *WebProcure* system. You can reactivate their account by changing their status to **Active**.
  - **Require Password Change on Next Login**

    When you create a new user, their default status is **Require Password Change on Next Login**. You cannot manually change their status to **Active**. The user must first log on and change their password. This status can be manually set if a user forgets their password and you need to reset it for them. You can change their password for them and set the status to **Require Password Change on Next Login**. The next time the user logs on they will be required to change their password.

Click Save

to save all changes to a user's profile.

Click Reset

to clear any of the changes made to the user's profile.

Add New User

Click the **Add New Users** option from the menu tree located in the left frame of the page.

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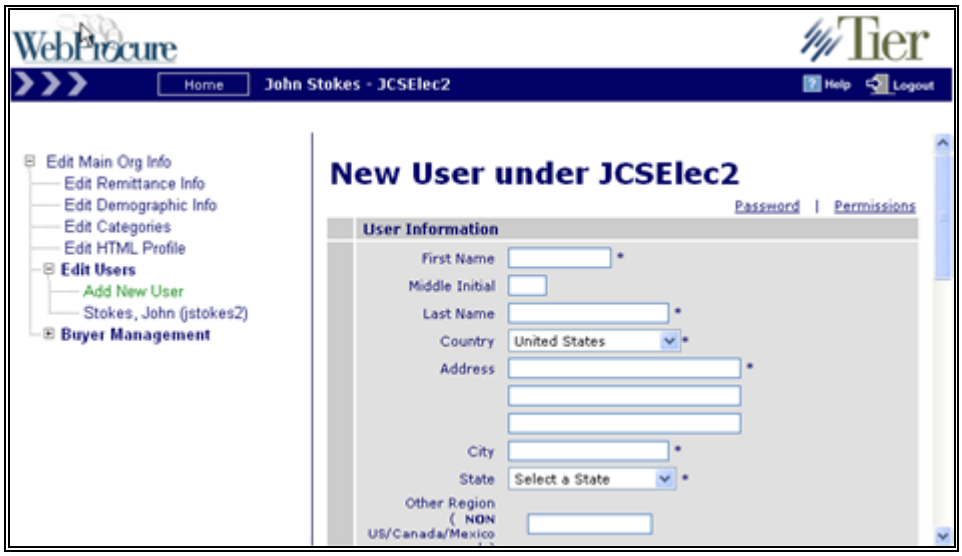
The **Add New User** page will open as shown below.



User Information

The user's contact information is entered in the **User Information** section.

The required information fields are noted with an asterisk *.

- **Password**

  You will be creating the User Name and Password for the user.

Note:

We recommend using the person's first initial and last name.

When the user first logs on to the system, they will use the password that you have assigned. After they have successfully logged on, they will be prompted to create a new password that is meaningful to them.

The password field is case sensitive; therefore if you use capitalization when creating the new password, the same capitalization has to be repeated during the log on process. Passwords have to be at least five characters in length, and cannot contain the user name or the word password.

Permissions

Listed below are all of the permissions available for assignment to user profiles:

- **Bid/Quotes**
  - **Create/Edit Item Reminders**

    This permission allows users to create and edit line item reminders.
  - **Respond to Bids/Quotes**

    This permission allows users to responds to Formal and Informal Solicitations.

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- **View Past Bids/Quotes**

  This permission allows users to view finalized or closed solicitations.

- **General**
  - **Access to Account Management**

    This permission allows the organization's user access to the **Account Management** Module where they can edit buyer account codes and specify the region(s) in which the organization wishes to do business.

  - **Access to Edit Organization's Information**

    This permission allows users to add new users and edit both user and organization information.

- **Status**
  - **Active**

    When a user has logged in for the first time and changed their password their status is set to **Active**.

  - **Suspended**

    You can set a user's status to **Suspended** if they are no longer able to use the *WebProcure* system. You can reactivate their account by changing their status to **Active**.

  - **Require Password Change on Next Login**

    When you create a new user, the default status is **Require Password Change on Next Login**. You cannot manually change their status to **Active**. They must first log on and change their password.

Click Save .

Click Reset to clear any of the changes you made to the user's profile.

Buyer Management

Manage all the buying organizations as well as completing all required customized fields for specific buying organizations through the **Buyer Management** option.

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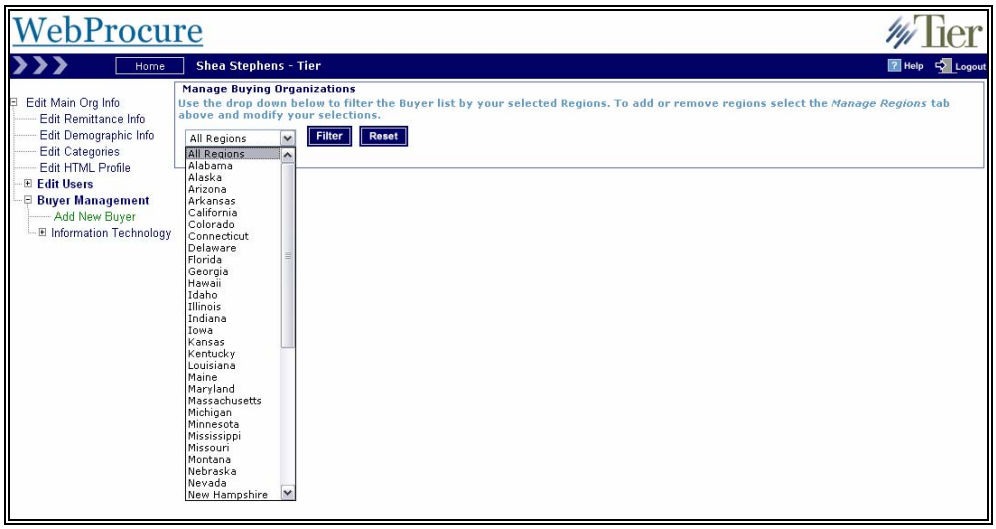
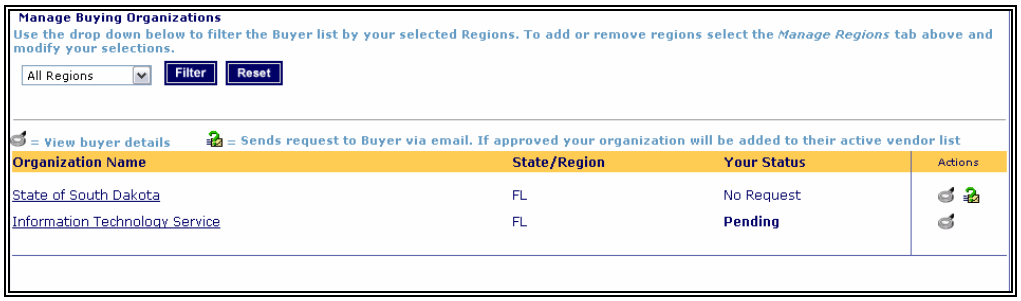
Click the **Buyer Management** option from the menu tree located in the left frame of the page.



Select the region(s) to view the buying organization that your organization would like to conduct business with through the *WebProcure* system.

1. Click the drop-down box.
2. Select the region.
3. Click Filter .

A list of the buyers with in the selected region(s) will be displayed as shown below.



Listed below is the information shown for each organization:

- **Organization Name**

  The name of the buyer organizations available for the region(s) you selected will appear.

  Click the name of the organization to view their contact information.

- **State/Region**

  Indicates the region(s) or state(s) the organization is located in.

- **Status**

  - **No Request**

    No Request status indicates that you have not yet requested to do business with the organization.

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- **Approved**

  Approved status indicates that the buying organization has approved you as a supplier.

- **Denied**

  Denied status indicates that the organization has denied your request to do business with them.

- **Pending**

  Pending status indicates that the organization has yet to approve you to do business with them.

- **Actions**

  - **Request**

    Click the Request icon to send a request via e-mail for approval from a buying organization that you would like to conduct business with through the *WebProcure* system.

  - **Buyer Details**

    Click the Buyer Details icon to view the contact information for the buying organization.

Additional Required Information for Buying Organization

Click on the blue arrow next to the buying organizations name listed under the **Manage Buyers** option from the menu tree in the left frame of the page.

The expanded view will contain the additional options listed below.

Additional Required Attributes

Click on the **Additional Required Attributes** option to view any additional fields that are required from the specific buying organization in order to complete the registration process.

Complete these additional required fields.

Click Save .

Click Reset to clear any of the changes made.

Account Codes

If your organization has a specific internal account code or customer code that is used to reference the buying organizations, provide the account code in the available field.

Additional Terms

Click the **Additional Terms** option to view the Terms and Conditions of the specific buying organization specified.

In the right frame of the page, the Terms and Conditions of the buying organization will be displayed.

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After reading the terms and conditions, click Accept

to accept.

Click Decline

to decline the terms and conditions of the selected buying organization.

Note:

*Once you have accepted the terms and conditions you may review the terms and conditions at any time by returning to the **Additional Terms** section as described above.*

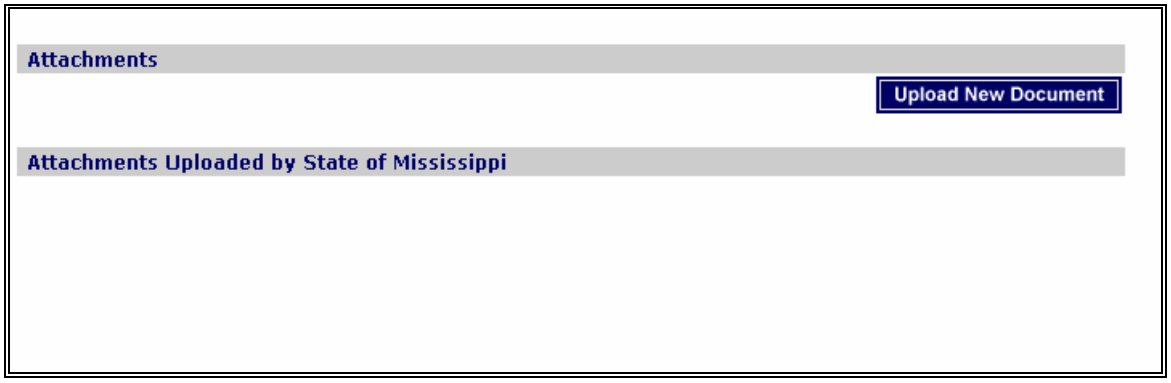
If you have previously accepted the terms and conditions of the specified buying organization then the following message will be displayed at the top of the **Additional Terms** page:

No terms and conditions required by a specified buying organization will display the following text on the **Additional Terms** page:

Attachments

Click the **Attachments** option to view the Terms and Conditions of the specific buying organization specified.

The **Attachments** page will open as shown below.



The two sections that are located on the **Attachments** page are described below.

- **Attachments**

  Click Upload New Document

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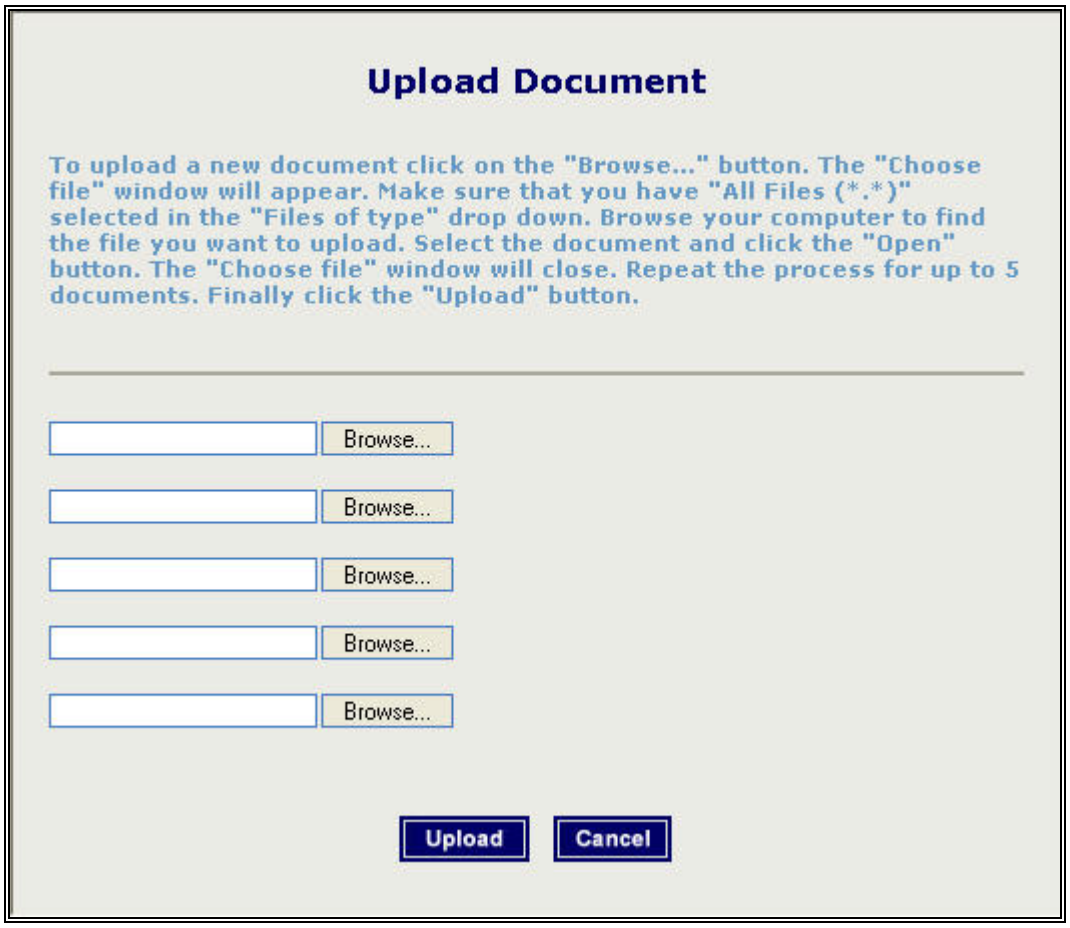
The **Upload Document** page will open as shown below.



Click Browse Browse....

The File Upload menu window will open. Select the document you want to upload.

Note:

Make sure that you have All Files selected in the File Type drop-down menu area so that you can see ALL of your files.

Click Upload Upload to finish uploading your documents.

Click Done Done once you have completed attaching all desired documents.

The document that you attached will now appear in the **Attachments** section of the page.

- **Attachments Uploaded by the "Buying Organization specified"**

  Any documents associated by the specified buying organization to your organizations profile will be displayed in the **Attachments Uploaded by the "Buying Organization specified"** section.

  Click on the **Document Name** link in order to open and view the associated document for viewing.

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- **Service Level**

  Buying organizations may provide different levels of services to their suppliers.

  If so, these service levels will be described on the **Service Level** page.

  If the specified buying organization does not provide service levels then the following text will appear on the page:

  The buying organization provides all services to its suppliers for free and does not require subscription service level selection by its suppliers.

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