Department of Administrative Services

Empowering People
Collaboration
Customer Service

IMPACS Contracts

Step-by-Step Guide for Contract Input, Renewals and Purchases

Table of Contents

Contract Instructions

1. **Creating a new contract in IMPACS if invoices are paid from contracts in I/3** – First, complete the contract in I/3. Next, using IMPACS select the **Create New Contract** function from the dashboard or menu, and follow the instructions in this guide to create the contract. Use the I/3 contract number for the IMPACS contract number.

2. **Creating a new contract in IMPACS *without* I/3 input** - If you do not use I/3 to pay contract invoices, please use your own contract naming convention (or the number generated by IMPACS) and create the contract **only in IMPACS** – either by the **Create Contract from solicitation function (if applicable)** or input the contract using the **Create New Contract** function from the dashboard or menu. Follow this guide.

3. **RENEWAL using I/3** - If the contract is in I/3, please renew the contract *first* in I/3. Next, create a **NEW** contract for the renewal in IMPACS and use the I/3 contract number. Click the **Contracts Action** button in the current contract and select **Copy** to create a new contract version for the renewal.

4. **RENEWAL in IMPACS ONLY** – Navigate to the **Contracts Action** button in the top right of the contract screen. Select **Renew.** IMPACS changes the contract term automatically, plus changes the main document with the new information. **Submit for Approval**. Once approved, the contract is renewed (Executed: Future) and the contract number stays the same.

Sign into Okta and locate the Jaggaer stickers

Click on DAS Jaggaer PROD to enter the Production site.

Main Menu

You may expand the Main Menu by clicking on the arrow at the bottom-left of the screen.

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Contracts Dashboard

Contracts Dashboard

Open the Contract Dashboard or the Contracts tab on the Main Menu. From either selection, the Buyer may search for Contracts, Vendors, part numbers, etc. or create a new Contract.

Create New Contract

Create Contract

From the Main Menu, select Contracts, Contracts (again), and Create New Contract. There are several ways to get here. Choose the method that works best for you.

Create New Contract

The Create Contract pop-up opens.

Name the Contract.

Select the Contract type by clicking the magnifying glass icon.

Create New Contract

Select the appropriate contract template.

Master Agreement Standard is the most common Contract Type. Use Master Agreement Cooperative (COOP) if working with a Public Entity COOP like NASPO, OMNIA, Sourcewell or the Regents.

Single Agencies may have their own template.

Create Contract ×

About the Contract *(Step 1 of 1)*

Contract Name *   Test Contract 074

Contract Type *   🔍

Master Agreement - Standard - Test
　In: Master Agreement - Standard - Test

Master Agreement COOP - Test
　In: Master Agreement COOP - Test

* Required

Create Contract

Create New Contract

Select the radio button for the Contract Template you want to use.

Select the Department (Agency) that the Contract Manager belongs to.

Create New Contract

Select the Contract Manager's Department (Agency).

Select the small arrow next to the State of Iowa to expand the list of all the Departments.
Note: there are Agencies listed under the Parent Agency.

Save Changes.

Create New Contract

When done, click **Create Contract**.

Create Contract

About the Contract *(Step 1 of 1)*

Contract Name *
Test Contract 074

Contract Type *
Master Agreement - Standard - Test
In: Master Agreement - Standard - Test

Use Contract Template   ● Yes   ○ No

Contract Template *
Master Agreement - Standard Test

Department *
Administrative Services

* Required

Create Contract

Contract Wizard

The Contract Wizard Opens. Navigate through the steps on the left side of the screen.

Note the banner at the top. When returning to edit the contract after it has been approved, the User must **Check Out** the contract. Be sure to check it back in when finished.

Contract Wizard

The status of the contract is located at the top. It provides useful information about some of the requirements.

The Contract Actions button at the top-right lists some additional actions. If you make a mistake, you can Delete the contract and start over (as long as the contract has not been approved).

Contracts Wizard

Contract Header

Contract - Header

Start the Wizard with the Header Section. The screen opens automatically to this screen.

Under **Contract Header**, the auto-generated contract number may be changed by selecting the pencil icon.

Match the 1/3 Contract number (if applicable), use your own naming convention or use the IMPACS-generated number.

Check that the **Contract Name**, **Type** and **Department** are correct.

Contract - Header

Click the Edit Summary button. The Contract Summary window opens.

Delete the instructions that are in the window and enter information about the contract's general purpose. Click **Done** when finished. **NOTE:** You may have to click **Close** as well.

Contract – Header – Contract Parties

The **First Party** is the Agency creating the contract. To change the Agency, delete the Agency listed by selecting the trashcan icon.

Contract – Header – Contract Parties

Click **Add First Party** to change the Agency. Select the search icon, and select your Agency. Then click **Select Contract Party.**

Contract Header – Contract Parties

Once you select your Agency, you will be prompted to add the Contract Manager's contact information. If you are not listed, create a new contact by clicking **Add Contact** and filling in your information. Click Next and choose your address or create one.

Contract Header – Contract Parties

The **Second Party** is the Vendor. To select the Vendor, click the **Add Second Party** button.

Contract Header – Contract Parties

You may search for the Vendor in the search bar. (If there are duplicates for the Vendor, click the information icon and check to see that the vendor is **In-Network**).

Select Primary Second Party

Search for Contract Party *(Step 1 of 3)*

Search | 🔍 | More Options

| ‹ | › | Page 1 of 112 | 1-10 of 1116 Results | | 10 Per Page ▼ |

	Contract Party Name ▽	Contract Party Types	Primary Address ▽
○	LLS ⓘ	Vendor	1305 W. Walnut DES MOINES, Iowa, 50319 US View Additional Addresses
○	AVI Systems ⓘ	Vendor	–
○	Iowa Corn Promotion Bd ⓘ	Vendor	–
○	SOIJAGGAERTEST ⓘ	Vendor	1305 E. Walnut Des Moines, Iowa, 50319 US View Additional Addresses
○	One Time Vendor ⓘ	Vendor	123 Main Street Anytown, Iowa, US
○	Laura Shannon ⓘ	Vendor	1305 East Walnut St. Level 3 Des Moines, Iowa, 50319 US View Additional Addresses
○	A-M Systems, Inc. 23 (DBA - AMS) ⓘ	Vendor	161 ROSA L PARKS BLVD NASHVILLE, Tennessee, 37203 US View Additional Addresses
○	Access For Special Kids ⓘ	Vendor	–
○	Wayne 23(DBA - Wayne Corp.) ⓘ	Vendor	1901 Gotham Street Franklin Hall 201 Suite 007 Gotham, Illinois, 60612 US View Additional Addresses
○	Wayne 23(DBA - Wayne Corp.) ⓘ	Vendor	1901 Gotham Street Franklin Hall 201 Suite 007 Gotham, Illinois, 60612 US View Additional Addresses

| ‹ | › | Page 1 of 112 | 1-10 of 1116 Results | | 10 Per Page ▲ |

Select Contract Party | Close

Contract Header – Contract Parties

After clicking the information icon

check to see that the vendor is In-Network which is indicated by this icon:

The Vendor *may* also have their I/3 vendor number listed to indicate this is the correct vendor to use. If in doubt, reach out to purchasing.mailbox@iowa.gov

Select Primary Second Party

Search for Contract Party *(Step 1 of 3)*

HP

More Options

	Contract Party Name ▽	Contract Party Types	Primary Address ▽
●	HP Inc ⓘ	Vendor	– View Additional Addresses
○	Hewlett Packard Financia ⓘ	Vendor	–

Select Contract Party   Close

Vendor Details

- In Network
- Active
- Non-Catalog ❓

HP Inc

Legal Name	HP Inc
DBA	HP Inc
Aliases	–
Vendor No.	00002145540
3rd Party Ref No.	–
Date of Last Order	–
Diversity	–
Registration Status	None

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Contract Header – Contract Parties

Once you have selected the Vendor, choose the main contact or create one. Best practice is to have the Vendor add the contact on their Vendor Portal.

Contract Header – Contract Parties

If you need to edit the contact information select the pencil icon ✏
NOTE: Once the contract is approved you will not be able to change the Contract Parties or Department, only the contact information. You may amend the contract to change the parties.

Contract Parties					Add First Party	Add Second Party
Name	**Currently Visible**	**Type**	**Contact**	**Contract Address**		
Department of Administrative Services - CP		Agency (Primary)	Betty Buyer	1305 East Walnut St. Level 3 Des Moines, Iowa, 50319 US	✏	🗑
HP Inc	✖	Vendor (Primary) ⓘ	Aaron Bennis	14231 TANDEM BLVD AUSTIN, TX, 78728-6612	✏	🗑

Contracts Wizard

Contract Header – Dates and Renewal
Contract Header – Additional Details

Contract Header – Dates and Renewal

The next section of the header page is **Dates and Renewal**.
Enter the contract **Start Date** and **End Date.**
Select the **Renewals Remaining** and the **Renewal Term.** Leave **Auto-Renew** set to **"No"**.
Expand the **Additional Details Section** and add additional contract details if needed.
Searchable Keywords are very important. Please identify the appropriate keywords for this contract.

Contracts Wizard

Contract Header – Contract Information

Contract Header – Contract Information

The next section is **Contract information**. Depending if you are using a cooperative contract template, standard contract template, or single agency template you will see different fields in this section.

In the contract **Applies To** selection box, choose the Agency or Entities that the contract applies to. If the contract applies to All State Agencies, Governmental Entities & Political Subdivisions then select that field.

Contract Information

Contract Applies To ★ ⓘ | Type to filter... 🔍

Contract Websites

2000 characters remaining

PunchOut or Hosted Catalog Enabled ★ ⓘ ○ Yes ○ No

Renewals Remaining ⓘ

ⓘ Field Validation

Contract Applies To

🔍

‹ › Page 1 of 11 1-10 of 103 Results 10 Per Page ▼

Name

AEA Purchasing	Select
Administrative Services, Department of	Select
Agriculture and Land Stewardship	Select
All State Agencies	Select
All State Agencies, Governmental Entities & Political Subdivisions	Select
Anamosa-Farm Accounts	Select
Attorney General	Select
Auditor of State	Select
Board of Parole	Select
Board of Regents	Select

‹ › Page 1 of 11 1-10 of 103 Results 10 Per Page ▼

Selected Value

No Value Selected

Close

Contract – Header – Contract Information

If there is a website – for instance, a Cooperative website that references contract information, post the link here.

Indicate if the Vendor is PunchOut or Hosted Catalog Enabled. Most likely the answer is "No".

Enter again the Renewals remaining so that the Master Agreement document (main document) shows the correct information.

Contract Information

Contract Applies To ★ ❶
All State Agencies, Governmental Entities & Political Subdivisions ✕ 🔍

Contract Websites
2000 characters remaining

PunchOut or Hosted Catalog Enabled ★ ❶
○ Yes   ○ No

Renewals Remaining ❶
▲
▼
ℹ Field Validation

Contracts Wizard

Contract Header – Terms and Conditions

Contract Header – Terms and Conditions

Under the **Terms & Conditions Section**, select the **Primary Terms and Conditions** from the drop-down menu.
If there are multiple Terms and Conditions, click the dropdown menus from the **Additional Terms and Conditions** fields. If there are no additional Terms and Conditions, then select **"Intentionally Left Blank".** The fields cannot be left unfilled.

Single Agency templates will be structured differently.

Contract Header - T&Cs

Reference the link for the Terms and Conditions you selected in the drop-down menus. Use the most recent updated link – for instance:

https://das.iowa.gov/sites/default/files/procurement/pdf/050116%20terms%20goods.pdf

Many of the terms can be found at:
https://das.iowa.gov/procurement/terms-and-conditions

Terms and Conditions

Primary Terms and Conditions * ℹ

Additional Terms and Conditions * ℹ

Additional Terms and Conditions * ℹ

Additional Terms and Conditions * ℹ

Terms and Conditions Website(s) ℹ

2000 characters remaining

Payment Terms * ℹ

Shipping Terms - Free on Board (FOB) * ℹ

Contract Header – T&Cs

Select the appropriate **Payment Terms** from the drop-down box.

Select the appropriate **Shipping Terms** from the drop-down box.

Terms and Conditions

Primary Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Terms and Conditions Website(s) ⓘ

2000 characters remaining

Payment Terms ★ ⓘ

Shipping Terms - Free on Board (FOB) ★ ⓘ

Payment Terms dropdown options:
- 0% 0, Net 10
- 0% 0 Net 15
- 0% 0, Net 30
- 0% 0, Net 45
- 0% 0, Net 60
- 1% 10, Net 60
- 1% 15, Net 60
- 2% 30, Net 60

Shipping Terms dropdown options:
- FOB Destination, Freight Prepaid
- FOB Origin
- FOB - Other
- Not Applicable

Contract Header – Goods and/or Services Summary

The Goods and/or Services Summary is a field that lists specifics about the items in a contract. Type in a summary of the Goods & Services.

If you prefer a list in a table format similar to the example to the right, see the section covering Master Agreement document editing.

Goods and/or Services Summary

Goods and/or Services Summary * ℹ

2000 characters remaining

Contract Goods and/or Services Summary

Catalog Number	Description	Price	Packaging (UOM)	Long Description
1	Glock G23 Gen 4 Compact Hand Gun	$ 409.00	EA - Each	Glock G23 Gen 4 Compact Hand Gun, Magazine 13 rounds Includes 3 magazines Full size magazine can be used in compact Striker fired Trigger Pull 5.5 pounds Fixed front sites Night Sights Free falling magazine Chamber load indicator
2	Glock G22 Gen 4 Full-Size Hand Gun	$ 409.00	EA - Each	Glock G22 Gen 4 Full-Size Hand Gun Magazine 15 rounds Includes 3 magazines Full size magazine can be used in compact Striker fired Trigger Pull 5.5 pounds Fixed front sites Night Sights Free falling magazine Chamber load indicator

Contract Wizard - Commodity Codes

The next Section in the Wizard is Commodity Codes. Add one or more Commodity Codes that apply to the contract.
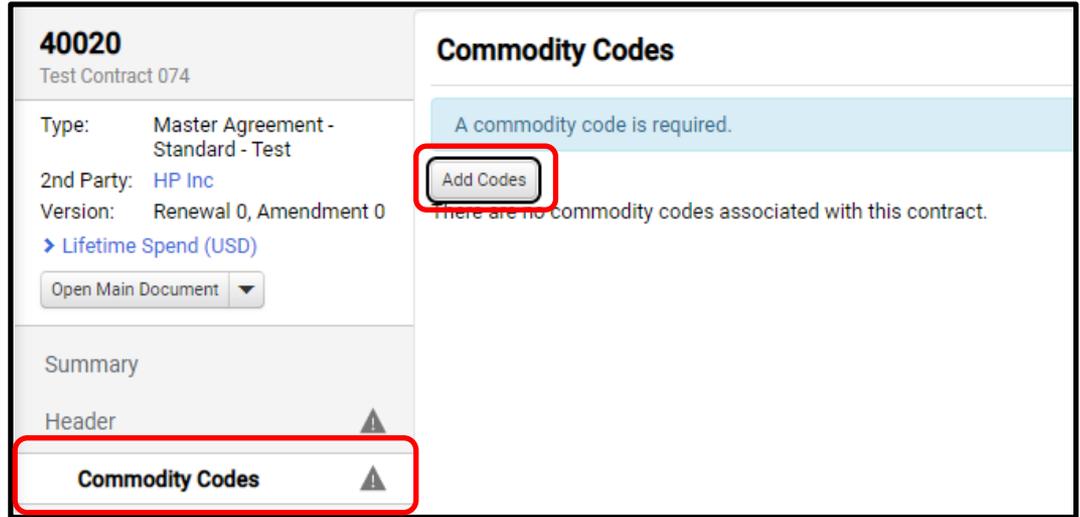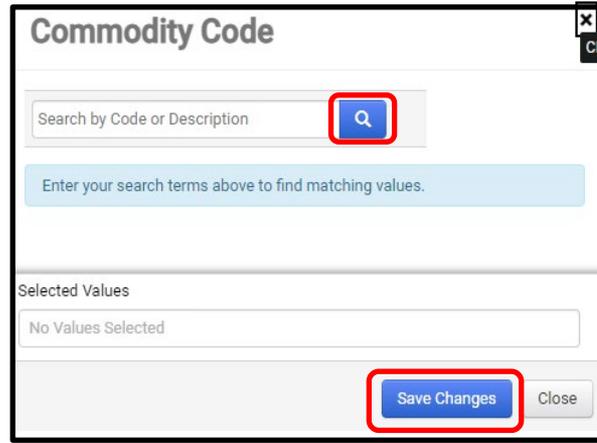
Click on the search button and search by code or description. **Save Changes** when done.

Contracts Wizard

Attachments

Contract Attachments

The next Section in the Wizard is **Alternative Language**. Skip that section and go to the next section: **Attachments**. In this section, you may add the relevant and mandatory documents each contract must have per State of Iowa procurement rules. You may also add **Internal Only** documents that can be seen only by Contract Managers and Administrators. Obligations will be covered in another section.

Contract Attachments

IMPACS generates a populated Master Agreement (MA) document based on the information that you entered in the Header. You may download this document, edit it as needed and send it for signature. See Page 46

Any Terms and Conditions that are not listed in the Terms and Conditions website field on the Header can be added to the MA Document by making sure **"Print with Full Contract"** is checked.

Contract Attachments

When inputting existing **signed** contracts for the first time, you should change the Main Document to the signed version (I/3 MA for instance). IMPORTANT: do not delete the IMPACS-generated document. You will need it for the contract renewal. Once you have uploaded the signed contract you can "Assign as Main Document" The crown icon ♛ indicates that the document is the Main Document. Always check Print with Full Contract for the signed contract.

Contract Attachments

IMPACS generates a populated Master Agreement (MA) document based on the information that was entered in the Header. You may download this document, edit it as needed and send it for review or signature. The example at the right is page 1 of the master agreement.

Single Agency main documents may be different.

State of Iowa Master Agreement
Contract Declaration and Execution
40020

Contract #	40020		
Contract Name	Test Contract 074		
Start Date	4/1/2023 12:00 AM		
End Date	3/31/2024 11:59 PM		
Renewal Term	1 Years		
Renewals Remaining	3		

Vendor/Contractor	SOIJAGGAERTEST		
PunchOut or Hosted Catalog Vendor	No		
Contract Manager	SOIJAGGAERTEST	SOIJAGGAERTEST@gmail.com	+1 515-330-7325
Other Contact			

Issuer	Department of Administrative Services - CP		
Contract Manager	David Kundid	david.kundid@iowa.gov	+1 515-745-2796

Authorized Departments	All State Agencies, Governmental Entities & Political Subdivisions
Shipping Terms	FOB Destination, Freight Prepaid
Payment Terms	0% 0, Net 60

Overview

Enter information about the contract's general purpose that will be displayed in specific places like the Contract Information window. Several formatting options are available and you can include external web links. For information about formatting this field, click the "?" in the top-right corner of the page. The Summary help topic will provide you with formatting details.
Delete the above paragraph when entering the information.

Contracts Wizard

Obligations

Contract Obligations

The next section is Obligations. The IMPACS system sets up reoccurring reminders to the Contract Manager and the Vendor for: Certificates of Insurance, Quarterly Sales Reports, Fees, Dues, reports or anything that occurs on a regular basis.

Contract Obligations

Click **Add Obligation and select Add Obligation from Library**

Contract Obligations

Select an Obligation to add. If the Obligation is not listed in the Library, you may add your own from the main Obligation screen. For this example, the COI will be used. DAS-Central Procurement may set up additional obligations in the library upon request.

Contract Obligations

After selecting the COI Obligation, a pop-up menu appears.

The description is self-populated, but you may edit it. Depending on the Obligation, you may choose if Documentation is required.

NOTE: Invoicing is not processed in IMPACS.
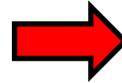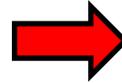
Add Obligation from Library

Properties Step 2 of 3

Name *	Insurance Certificate Renewal (COI)
Description *	Annual review of Liability Insurance Certificate (COI)
	202 characters remaining
Tags	coi ✕ 🔍
Options	☑ Documentation Is Required
	☐ Prompt to Create Invoice When Marked as Complete
Frequency *	Recurring
Repeats Every *	1 ▲▼ Years
	in January
	on Day 1 ▲▼ ⓘ
Start *	On Custom Date
	mm/dd/yyyy 📅
End *	By Custom Date
	mm/dd/yyyy 📅
Due *	11:59 PM 🕐
	hh:mm a
Time Zone *	☑ Same as Contract (CST)

★ Required   Previous   Next   Close

Contract Obligations

Determine the term of the COI and enter the date (without the year) that the COI renews in the **"Repeats Every"** field.

The Start Date should be the same date as the **"Repeats Every"** date. If the start date occurs after the end of the contract term (even if the contract will be renewed), DO NOT enter the Obligation.
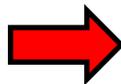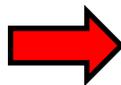
Contract Obligations

The End Date – select **"By Contract End Date".** There are multiple selections in the drop-down box that may be used if you are crafting your own Obligation. For COI, Quarterly Sales Reports and Administration Fee Obligations, please use **"By Contract End Date"** When done, click **Next.**
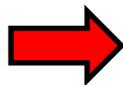
Add Obligation from Library

Properties Step 2 of 3

Name * — Insurance Certificate Renewal (COI)

Description * — Annual review of Liability Insurance Certificate (COI)
202 characters remaining

Tags — coi ×

Options — ☑ Documentation Is Required
☐ Prompt to Create Invoice When Marked as Complete

Frequency * — Recurring

Repeats Every * — 1 — Years

in — January

on — Day — 1

Start * — On Custom Date
mm/dd/yyyy

End * — By Contract End Date

Due * — 11:59 PM
hh:mm a

Time Zone * — ☑ Same as Contract (CST)

* Required — Previous — Next — Close

Contract Obligations

The next screen allows you to add Owners and Stakeholders to receive email reminders that the Obligation is coming due.

The First Party Owner, (the Contract Manager) is automatically added.

Click on the "**Add New"** button to add the Vendor contact to receive the reminders.

Contract Obligations

The Add Owner or Stakeholder pop-up screen appears.

Change the Role to **Second Party Stakeholder**.

Click the search icon to find the Vendor's contact name.

Contract Obligations

The **Second Party Search** pop-up screen appears.

Select the **Second Party Stakeholder** contact whom you would like to receive the Obligation notifications.

In this example - one of these contacts.

Contract Obligations

Once you have selected the **Second Party Stakeholder** contact, you are redirected back to the **Add Owner or Stakeholder** screen.

You may select which notifications the Vendor will receive here.

Click **Save** or **Save Add Another**.

Add Owner or Stakeholder

Role ★   Second Party Stakeholder ▾

Second Party Contact ★   JAGGAERTEST, SOI (Primary Corporate) × 🔍

Task/Notes

1000 characters remaining

Send Notifications   ☑ Advance Notice
☑ Due Date
☑ Past Due Notice
☐ Completed

★ Required   Save   Save and Add Another   Close

Contract Obligations

You are redirected back to the **Add Obligations from Library Screen.** Here you may select the number of days in advance the Vendor will receive the notifications. Select the days that work for best for you then click **Save Changes**.

Contract Obligations

You are redirected back to the Obligations Main Screen. You will now see the Obligation listed. If the contract term spans years, then there will be multiple listings.

Contract Obligations

A listing of all Obligations can be found under the drop-down box here. Select **Series**.

Obligations ⓘ   View XML History 📄 ?

Add Obligation ▼

Show Recurring Obligations As   [Series ▼]

1-1 of 1 Results   ⚙ 200 Per Page ▼

Obligation Name ▽	Obligation Id ▽	Status ▽	Due Date ▽	Complete Date ▽	First Party Owner
Insurance Certificate Renewal (COI) 📎	248168	Future	Every 1 year in January on the 1st of the month at 11:59 PM Start on 4/30/2023 CDT (custom) End on 3/31/2024 CDT (contract end) ⟳	–		Actions ▼

Contract Obligations

You may view or edit the Properties, "Cancel" or "Mark as Complete" by clicking the Actions button on the Occurrence. To "Mark as Complete", click it in the drop-down box.

Contract Obligations

The Mark as Complete pop-up box appears and you may upload the COI in the Attachments section then select Mark as Complete.

Contract Obligations

Once you have "Marked as Complete" the Obligation, you will see the status change to **Complete**.

The document is located in the Attachments tab in the Wizard under Obligations. See page 43.

Contracts Wizard

Review Rounds

Contract Review Rounds

The next Section is Review Rounds. You may send out the contract for review both internally and also externally for redlines and comments.

The next tab in the Wizard is **Submit for Approval.** Skip that tab for now, it will be the last step in the contract input Wizard.

Contract eProcurement

The next Section of the Wizard is eProcurement Setup.
If the Vendor has only one contract in the IMPACS system, then change the **Automatically Apply Purchases from this Vendor to this Contract** to **"Yes"**. Otherwise, leave this field **"No" (Default).**

Contract eProcurement

If the Vendor has negotiated special **Payment Terms**, you may enter those terms in this section. This is in addition to selecting the correct Payment Terms on the **Header** page. **It is typically left blank.**

Contract eProcurement

The Vendor Visible Custom Fields and the Code Defaults on Invoice sections are not used, as the Invoice functionality is not active in IMPACS.

Leave the **Display Options in Browse Contracts** set to **the default ("Yes").**

NOTE: It is likely that you may skip the eProcurement section altogether when entering your contract.

Contract eProcurement

The **Budget and Spend** section of the Wizard is a reporting page that you may use to find spending information about this contract.

If there are budget limitations for the contract, you may enter the total budget on the **Budget** line. You may also limit purchase requisition spend on the **Limits Per Requisition** lines.

Contracts Wizard

Applies To

Contract Applies To

The **Applies To** section allows you to choose which Agencies this contract applies to. If the Contract applies to All Agencies, then leave the section set at **"Apply to All"**.

Leave the **Available Roles** set to **Apply to All**.

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Contracts Wizard

Goods and Services

Contract Goods and Services

The **Goods and Services** section allows adding items to the contract. Called Commodities in I/3, this is where the Contract products and services are listed.

To enter the items, select the Non-Catalog Items tab at the top of the page.

Contract Goods and Services

Click on the **Add Contract Non-Catalog Item** button.

Contract Goods and Services

The **Contract Non-Catalog Item** pop-up screen appears.

The top line with the **bold** type is mandatory.

Describe the product or service in the **Description** field.

If a **Catalog Number** does not exist for the product or service, enter **01** for the first item. Enter **02** for the next item and so on.

If there are more than 100 items to enter, start with 001 as the catalog number.

Contract Goods and Services

Enter the **Size** or if not applicable, enter **"none"**.

Enter the **Price** of the item in the **Price** field.

Enter the **Packaging** information or **Units of Measure (UOM)** information. If not applicable, enter **"none".**

Contract Goods and Services

You may fill out the rest of the fields to better define the item or service.

It is best practice to enter **Additional Searchable Keywords** and/or **Commodity Code** for each item.

If the item qualifies for Product Flags, then check the appropriate boxes.

If the item has a picture, you may upload it to help identify the item on the SHOP module.

Contract Goods and Services

Once you **Save** the item, you may **Copy as New**. This retains the information from the last item entered. Change the Catalog number and other information that may not apply to the new item.

You may also **Add New**, which does not retain the information from the last item entered.

Contract Goods and Services

After all the items have been entered, you will see the list in the Non-Catalog tab of the Goods and Services section. You may edit the line by selecting the **Catalog Number**.

You may search for the Contract item by clicking on **Search Contract Non-Catalog Items**. Once out of the contract Wizard there are other ways to search for items.

Contract Goods and Services

If you have a long list of items to enter, you might prefer to add them via spreadsheet.

Download the template here.

It is a text file, but once you save the template to your computer, you can open the .txt file with Microsoft Excel.

The instructions for filling out the template can be downloaded here.

Contract Goods and Services

Once you have filled out the spreadsheet, make sure you save it as a .txt file.

Then select **Validate** from the drop-down menu, choose the saved file then click **Submit**. The system will make sure that there are not any errors with the data in the template.

If there are no errors, then select **Import** from the drop-down menu, select the saved file and **Submit**.

Contract Goods and Services

After importing the Non-Catalog items, they will be listed under the Non-Catalog tab. There is no limit on how many total items can be imported, but only 100 items can be imported at a time. It is advised to adjust the Catalog Number to 001 if there are more than 100 items, and 0001 if there are more than 1000 items.

Contract Goods and Services

Adding the actual items to the Goods and Services Section is the best practice, some contracts will have $0 dollar items due to fluctuating pricing. In this case, the Buyer on the SHOP module may fill out a Non-Catalog Form to create a purchase requisition from the Contract.

There is no need to populate the form when inputting a contract.

Contract Goods and Services

(Optional) You may select from multiple forms by clicking the **Add Form** button. The form will then be searchable for this Contract and Vendor on the SHOP page. Once the form is located on the SHOP page, the Buyer will find the pricing for the item(s) on their own, populate the form and then submit the form as a purchase requisition.

Goods and Services

View XML | History | 📄 | ?

[Forms]   Ordering Instructions   Non-Catalog Items

You can make Contract Forms appear in product search results in two ways:
1. Turn on the "Show Contract Forms in Product Search Results" below.
2. Add the contract forms to Favorites (which also appear in product search results).

You must set up at least one of the two options mentioned above for this contract's forms to appear in the search results.

Options

Show Contract Forms in Product Search Results   ● Yes   ○ No

Contract Forms

Non-Catalog Form Item List by Laura Shannon (From ContractType)   Add to Favorites ▼

View form availability
   Description: Non-Catalog Form Item List
   Form Type: Non-Catalog Items Form

[Add Form]

Contract Goods and Services

(Optional) You may preview the form by clicking on the name of the form. Once the contract is approved, the form will populate with the correct Vendor and Contract Number.

Contract PO Clauses

The PO Clauses tab on the Contract Wizard lists the various terms and conditions that can be added to the Purchase Order (PO). Scroll down the page to find terms that may apply to the contract. Check the box for all that apply.

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Contracts Wizard

Comments

Contract Comments

The Comments section of the Contract Wizard is for the Contract Manager to start a discussion thread about the contract with Users of the IMPACS system. The User will receive an email that will have a link to view the comments within the contract. The User can then respond to the comment thread.

Contracts Wizard

Communication Center

Contract Communication Center

The Communication Center section of the Contract Wizard is where to manage correspondence about a contract from one central location.

The messages and their replies are saved and can be accessed from the contract's Communication Center.

When recipients reply, all recipients will receive the response, and the entire conversation thread can be viewed in the Communication Center.

Contract Communication Center

The **Add Internal Message** contract action is used to send communications from a contract. The messages and their replies are saved and can be accessed from the Contract's Communication Center.

In the **Attachments** section, upload an attachment from a your computer by clicking the **Add Attachments** button. Select the files you want to attach and click **Done**. Click the **Create** button. The message is sent to the recipient(s) and the conversation is added to the **Communication Center** page. (See next page).

Contract Communication Center

In one of the Internal Messages, an **Attachment** was added. From the Actions button, you may **Add/Update Main Document** (Contract MA document) or **Add/Update Attachment.**

Contract Communication Center

The **External Communication tab** is navigated the same way as Internal Communication.

Contracts Wizard

Users and Contacts

Contract Users and Contacts

Navigating to the Users and Contacts Section of the Wizard, you will find the people who have access to the contract and their roles. You may add or edit the Users.

Contract Users and Contacts

Expand the **Users from Department** section to see the Contract Administrators and Contract Managers that can edit and view the contract. You may make these contacts confidential (optional).

Contract Users and Contacts

Expand the **Visibility Controls** section to assign who can view the full Contract or who has a **Partial** or **Limited** view. It is recommended to set **Users Who May Manage Other Contracts** to **"Full"** and **All Other Users** to **"Limited".**

Contract Users and Contacts

Expand the **External Contacts** section to add External Contacts (optional)

External Contacts

You can use External Contacts to document contact information and send other parties email notifications. To manage these contacts, go to Edit External Contacts.

External Contacts

Added directly to this contract: 👤 Add Contacts

None

Inherited on all contracts for this vendor

Shannon, Laura

Contracts Wizard

Notifications

Contract Notifications

In the Notifications section of the Wizard, you may select the types of events that you will receive (optional).

Advance Notice Settings may be set for Start Date, End Date and Renewal Date.

Your Department, Stakeholders and External Contacts may be notified if you check the corresponding box(es).

Contract Notifications

In the **Spend Tier Notifications Settings** section, you may select to be notified for PR spend, PO spend (invoice spend is not used) or add your own amount or percentage tier (optional). Be sure to check the corresponding box in the Notification Type section at the top of the page.

Save Changes.

Contract Family

The Contract Family screen displays a list of all contracts connected to a contract, grouped by parent/child relationships, and amendments/renewals. Related contracts are grouped into two sections:

Parent/Child Contracts lists all contracts that are either a parent or child of the selected contract.

Contract Versions lists all amendments and renewals of the contract selected **"This Contract"** in the Parent/Child section above.

Contract Family

The Contract Family screen also allows you to create a child contract (in the dropdown menu) or link a child contract to your contract

Click the info icon to open the Contract Summary, and from there you may open the contract by clicking **Go to Contract**

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Contracts Wizard

Submit for Approval

Contract – Submit for Approval

The next step is to **Submit for Approval**.

If you have skipped a required step when creating the contract, you will see the **Progress** as **Incomplete**.

You may navigate to the item needing attention by clicking on the item hyperlink.

Contract – Submit for Approval

When all required fields are completed, then you will see a green checkmark in the **Progress** column.

To view the Approval Steps and to view the approvers for this contract, expand the **View Approval Steps** field.

Click **Submit for Approval**

If you self-approve your own contracts, navigate back to the contract, click **Approvals** in the Wizard, and click **Expedite**.

Renewals

Contract – Renewals for Contracts that are also in I/3

Renewals will **start** in I/3.
Follow the I/3 steps to renew.

Take the new contract number in I/3 (usually the same number with a trailing letter) and create a **NEW** contract in IMPACS. Do not use the IMPACS renew function. Select "copy" from the **Contracts Action** button (upper right corner) to create a new renewal contract from the current expiring contract. Change the contract term dates and "renewals remaining" fields. Update other information as needed.

Contract – Renewals only in IMPACS – not present in I/3

Renewals will **start** in IMPACS.

Use the IMPACS renew function. Navigate to the **Contracts Action** button in the top right of the contract screen. Select **Renew**. IMPACS changes the contract term dates and one of the "renewals remaining" fields automatically. It also populates the main document with the new information (with the exception of the second renewals remaining field that must be changed manually). **Submit for Approval**. Once approved, the contract is renewed (Executed: Future) and the contract number stays the same.

Contract Termination or Ending Early

Contract – End Early and Termination

To **End the Contract Early** or **Terminate** a contract in IMPACS, Click on **Contract Actions** and select the action from the dropdown menu.

You may reverse the **End Early** action by clicking Contract Actions and selecting **Return to Executed**.

When selecting **Terminate Contract**, a popup window opens. Note: Terminating the contract cannot be undone.

Purchasing from Contracts

Purchasing from Contracts

The process is similar for purchasing off of contracts. Instead of selecting a Vendor PunchOut sticker, you may use a simple or advanced search to find the good, service or task to purchase. You may have saved Favorites, and you will find your favorites in the **Go to** line.

Dashboards · Home Dashboard

| Accounts Payable Dashboard | Admin Dashboard | Admin Dashboard - LS | Contract Manager Dashboard | Contract Manager Dashboard - LS | Home Dashboard | Laura's Dashboard -1 | Shop Dashboard - LS |

Shop   ...

Simple   Advanced   Go to: Favorites | Forms | Non-Catalog Item | Service Item | Quick Order   Browse: Vendors | Categories | Contracts

Search for products, vendors, forms, part number, etc.   🔍

Purchasing from Contracts

In this example, "Cog" is typed into the search line. The following products displayed from the search. You may narrow down your search by using the left menu and search by vendor, category, etc. The green ribbon icon in the upper-left corner of the item box means that the item has a contract in place. You may view the contract by clicking on the icon.

Purchasing from Contracts

Select the quantity and **Add to Cart**. By selecting the arrow next to the **Add to Cart** button, other actions may be selected.

Purchasing from Contracts

Once you have added the item(s) to the cart, a SUCCESS popup appears and you may select to view the cart or Checkout from here. Or you may select the cart icon and have the same option with the additional function of deleting the items in your cart, by clicking the trashcan icon.

Purchasing from Contracts

The Shopping Cart opens and the process is the same as with the PunchOut purchase requisition creation. Note the contract has self-populated and the blue and silver ribbon indicates that this is a **Contract Non-catalog Item**. Change the PR name (if needed) and populate the commodity code. **Proceed to Checkout**.

Purchase Orders

Steps for Purchase Order Approval and Distribution

Purchase Orders

The Purchase Requisition enters the approval workflow. The steps and status are outlined on the right side of the screen.

Purchase Orders

The Purchase Requisition is sent to the approver(s) by email. The approver can open the email and see the Purchase Requisition details. They may Approve, Reject or assign the document to themselves. If the document is rejected, it becomes locked and edits cannot be made. You must start over with a new Purchase Requisition.
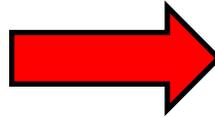
Department Approval Catch All Approval Request for Requisition# 3699228

Dear Laura Shannon,

The requisition listed below has been submitted for your approval.

Summary

Folder:	Department Approval Catch All
Prepared by:	Laura Shannon
Cart Name:	2023-01-31 laura.shannon@iowa.gov 01
Requisition No.:	3699228
Priority:	Normal
No. of line items:	1

TOTAL: 20.00 USD

Details

SOIJAGGAERTEST

Item 1

Description:	Cog 2
Catalog Number:	None
Quantity:	1
Unit Price:	20.00 USD
Ext. Price:	20.00 USD
Contract:	0113-2023 (Test Contract 019)
Size/Packaging:	None EA
Taxable:	No
Commodity Code:	10512

TOTAL: 20.00 USD

Accounting Codes

Accounting Codes

Department:	005 : Department of Administrative Services
Fund:	–
Appropriation:	–
Unit:	–

Ready to approve, reject or assign this document to yourself?
Take Action

Additional Information

Summary Details
Comments: (0)

Other Possible Approvers
Karl Wendt

Shipping Address
PROCUREMENT SERVICES
ADMINISTRATIVE SERVICES DEPT OF
1305 E WALNUT 3rd Floor
HOOVER STATE OFFICE BLDG
DES MOINES, IA 50319-0105
United States

Purchase Orders

Once the Purchase Requisition is approved, the status will indicate **Completed** and the purchase order number will display. Click on the Purchase Order hyperlink.

Purchase Orders

The Status of the Purchase Order is displayed.

Purchase Orders

How the PO is sent to the Vendor is specified in their Vendor Profile. The preferred method is to send the Vendor an email with the PO attached as a PDF (this is the default). The Vendor may opt for a fax, in which they should provide the phone # in their profile. You may also print and manually send the PO – this is discouraged. On the Purchase Requisition, the Buyer may also select the PO distribution method.

Invoice Payment

The Vendor invoice will be sent to the Buyer **Bill To** address on the purchase requisition.

Enter the basic purchase information into I/3. Use the PRC, GAX or P-Card method to pay the invoice. If a State Agency has a different way to pay the Vendor, then continue using that method.

Non-State Agency entities will pay the Vendor in the way they always have.

Questions?

Contact:

Laura Shannon

laura.shannon@iowa.gov

515-330-7325