



**Department of  
Administrative Services**

*Empowering People  
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# IMPACS Contracts

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

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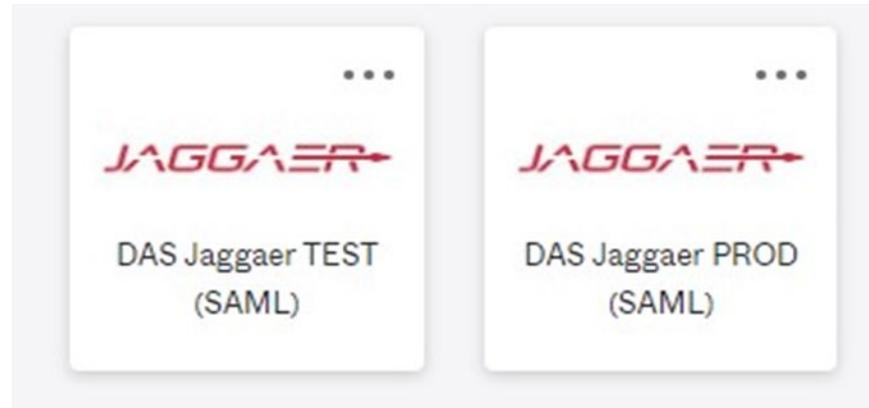
# Contract Instructions

- 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.



Home  
Shop  
Orders  
Contracts  
Accounts Payable  
Vendors  
Sourcing  
Reporting  
Administer  
Setup

Menu Search

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.

Showcases

PunchOut Catalogs

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3663824	2022-12-05 laura.shannon@iowa.gov 01	My Drafts	12/5/2022	2,674.81 USD
3647507	2022-11-08 laura.shannon@iowa.gov 01	My Drafts	11/8/2022	19,456.64 USD
3647535	Copy of RFB 17 Test 001	My Drafts	11/8/2022	1,595.00 USD





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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.

The screenshot displays the 'Contract Manager Dashboard' within a web application. The interface includes a dark blue sidebar menu on the left with options: Home, Shop, Orders, Contracts (highlighted with a red box), Vendors, Sourcing, Reporting, Administer, and Setup. The main content area is titled 'Dashboards - Contract Manager Dashboard' and contains several sections: 'Action Items' (Administrative Items, Import/Exports - Completed), 'Contract Search' (with a search bar and 'Search Contract Parties' link), 'Contract Summary' (displaying 'There are no Contracts to display.'), 'My Contracts' (displaying 'There are no Contracts to display.'), and 'My Contracts Expiring in 150 Days' (displaying 'There are no Contracts to display.'). A 'Quick Links' panel on the right features a red box around the 'Create New Contract...' link, along with other options like 'Add Contract Party...', 'Contracts to Approve', and 'View Saved Searches'. The bottom right corner of the page indicates it is 'Powered by JAGSABE | Privacy'.





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# 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.

The screenshot displays the 'Iowa Management of Procurement and Contracts System' interface. The main menu on the left includes options like Home, Shop, Orders, Contracts, Vendors, Sourcing, Reporting, Administer, and Setup. The 'Contracts' menu item is highlighted with a red box. A sub-menu is open for 'Contracts', listing options such as Contracts Home, Search Contracts, View Saved Searches, Search Contract Attachments, Create New Contract... (highlighted with a red box), Create and Manage Export Templates, Contract Import/Export..., Search Contract Parties, Add Contract Party..., Contract Party Import/Export..., View Import/Export Results, and External Contacts. The breadcrumb trail at the top shows 'Dashboards > Contract Manager Dashboard'.

# Create New Contract

The Create Contract pop-up opens.

Name the Contract.

Select the Contract type by clicking the magnifying glass icon.

**Create Contract** ×

**About the Contract** *(Step 1 of 1)* ?

Contract Name <sup>★</sup>

Contract Type <sup>★</sup>  

<sup>★</sup> Required Create Contract

# 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** [Close]

**About the Contract** (Step 1 of 1) [Print] [Help]

Contract Name ★

Contract Type ★  [Search]

- 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 Contract** (Step 1 of 1)

Contract Name \*

Contract Type \*

Use Contract Template  Yes  No

Contract Template \*

Department \*

Main Document Template

\* Required

**Select Values**

Master Agreement - Standard Test

Selected Value

# 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 Contract**

**About the Contract** (Step 1 of 1)

Contract Name \* Test Contract 074

Contract Type \* Master Agreement - Standard - Test

Use Contract Template  Yes  No

Contract Template \* Master Agreement - Standard Test

Department \* Type to filter...

\* Required

Create Contract

**Departments**

State of Iowa

Selected Value

No Value Selected

Save Changes Close

**Departments**

State of Iowa

- Administrative Services
- AEA Purchasing
- Agriculture and Land Stewardship
- All State Agencies
- Anamosa-Farm Accounts
- Attorney General
- Auditor of State
- Board of Parole
- Board of Regents
- Civil Rights Commission
- College Aid
- Commerce-Administration
- Consumer Advocate
- Corrections-Central Office
- Department for the Blind
- Department For The Blind - Capitals
- Department of Cultural Affairs
- Department of Education
- Department of Homeland Security & Emergency Mgmt
- Department of Human Rights
- Department of Human Services-Administration
- Department of Inspection and Appeals
- Department of Management
- Department of Natural Resources
- Department of Public Defense

Selected Value

No Value Selected

Save Changes Close

# Create New Contract

When done, click  
**Create Contract.**

## Create Contract ✕

**About the Contract** *(Step 1 of 1)* 📄 ?

Contract Name <sup>★</sup>

Contract Type <sup>★</sup>  ✕ 🔍  
In: Master Agreement - Standard - Test

Use Contract Template  Yes  No

Contract Template <sup>★</sup>  ✕ 🔍

Department <sup>★</sup>  ✕ 🔍

<sup>★</sup> Required

**Create Contract**





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# Contracts Wizard

# 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.

**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping. Contract Actions

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test

2nd Party: Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

**Header**

- Commodity Codes
- Alternative Language
- Attachments
- Obligations
- Review Rounds
- Submit for Approval
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Comments

**Contract Header**

Contract Number \* 40020

Contract Name \* Test Contract 074

Contract Type \* Master Agreement - Standard - Test

Department \* Administrative Services  
State of Iowa

Parent Contract: Type to filter...

Show on Vendor Portal  Yes  No  Inherit From General Contract Settings -- Current Setting: Yes

Summary \* 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. Edit Summary

Delete the above paragraph when entering the information.

**Contract Parties**

Name	Currently Visible	Type	Contract	Contract Address
Department of Administrative Services		Agency (Primary)	-	-

Your contract must have a Primary Second Party.

**Dates and Renewal**

Time Zone \* CDT/CST - Central Standard Time (US/Cent)

Start Date \* mm/dd/yyyy hh:mm a  
 Update Start Date Upon Execution

End Date \*

Renewals Remaining

Renewal Term

Auto-Renew  Yes  No

★ Required

Previous Save Progress Next



# 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).



**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping.

This Contract is currently checked out to You It is locked and cannot be edited by others until you

### 40020

Test Contract 074

Type: Master Agreement - Standard - Test

2nd Party: Version: Renewal 0, Amendment 0

> Lifetime Spend (USD)

Open Main Document

### Header

Commodity Codes

Alternative Language 0

Attachments 1

Obligations 0

Review Rounds 0

Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

PO Clauses

Comments 0

### Contract Header

Contract Number \* 40020

Contract Name \* Test Contract 074

Contract Type \* Master Agreement - Standard - Test

Department \* Administrative Services State of Iowa

Summary \* 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.

### Contract Parties

Name	Currently Visible	Type	Contact	Contract Address
Department of Administrative Services		Agency (Primary)	-	-

Your contract must have a Primary Second Party.

### Dates and Renewal

Time Zone \* CDT/CST - Central Standard Time (US/Cent)

Start Date \* mm/dd/yyyy hh:mm a

End Date \* mm/dd/yyyy hh:mm a

Renewals Remaining

Renewal Term

Auto-Renew  Yes  No

Update Start Date Upon Execution

Contract Actions

- Check In
- Terminate
- Archive
- Copy
- Delete Contract
- Add Internal Message
- Start External Communication
- View/Reactivate Subscribers

Save Progress



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# 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 I/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.

**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping. Contract Actions

This Contract is currently checked out to You It is locked and cannot be edited by others until you check it in. Check In

**40020** Test Contract 074 **Contract Header** View XML History | ?

Type: Master Agreement - Standard - Test Parent Contract Type to filter... [Search]

2nd Party: Version: Renewal 0, Amendment 0 Show on Vendor Portal  Yes  No  Inherit From General Contract Settings -- Current Setting: Yes

> Lifetime Spend (USD) Open Main Document

Summary **Header** Summary \*

Commodity Codes Alternative Language Attachments Obligations Review Rounds Submit for Approval eProcurement Setup Budget and Spend Applies To Goods and Services PO Clauses Comments

Contract Number \* 40020 [Pencil Icon]

Contract Name \* Test Contract 074

Contract Type \* Master Agreement - Standard - Test

Department \* Administrative Services State of Iowa

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. Edit Summary

Delete the above paragraph when entering the information.

**Contract Parties** Add First Party Add Second Party

Name	Currently Visible	Type	Contract	Contract Address
Department of Administrative Services		Agency (Primary)	-	-

⚠ Your contract must have a Primary Second Party.

**Dates and Renewal**

Time Zone \* CDT/CST - Central Standard Time (US/Cent) Renewals Remaining [Field]

Start Date \* [Calendar Icon] mm/dd/yyyy hh:mm a Renewal Term [Field] [Dropdown]

Update Start Date Upon Execution Auto-Renew  Yes  No

End Date \* [Calendar Icon]

★ Required < Previous Save Progress Next >



# 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.



The screenshot shows the 'Contract Header' window for contract 40020. The 'Summary' field contains the following text: "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." A red box highlights this text, and a red arrow points to the 'Edit Summary' button. Below this, the 'Contract Summary' window is shown, which is a rich text editor with the same text as the 'Summary' field. A red box highlights the 'Done' and 'Close' buttons at the bottom of this window.



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# Contracts Wizard

## Contract Parties

# 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.

**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping. Contract Actions

**Lock** This Contract is currently checked out to You It is locked and cannot be edited by others until you check it in. Check In

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party:  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

**Header**

- Commodity Codes
- Alternative Language
- Attachments
- Obligations
- Review Rounds
- Submit for Approval
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Comments

**Contract Header** View XML History ?

Contract Number \* 40020 Parent Contract

Contract Name \*  Show on Vendor Portal  Yes  No  Inherit From General Contract Settings -- Current Setting: Yes

Contract Type \*  Department \*

Summary \* 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. Edit Summary

**Contract Parties** Add First Party Add Second Party

Name	Currently Visible	Type	Contact	Contract Address	
Department of Administrative Services		Agency (Primary)	-	-	

**Dates and Renewal**

Time Zone \*  Renewals Remaining

Start Date \*  Renewal Term

Update Start Date Upon Execution Auto-Renew  Yes  No

End Date \*

**★ Required** Previous Save Progress Next



# 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**.

**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party are required. Both a Start and End Date are required to create a contract.

This Contract is currently checked out to You. Users until you check it in. [Check In](#)

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
[Open Main Document](#)

Summary

**Header**

- Commodity Codes
- Alternative Language
- Attachments
- Obligations
- Review Rounds
- Submit for Approval
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses

**Contract Parties**

Name	Currently Visible	Type	Contact	Contract Address
⚠️ Your contract must have a Primary First Party. ⚠️ Your contract must have a Primary Second Party.				

**Dates and Renewal**

Time Zone \* CDT/CST - Central Standard Time (US/Cent) Renewals Remaining

Start Date \*        
mm/dd/yyyy hh:mm a  
 Update Start Date Upon Execution

Auto-Renew  Yes  No

★ Required

[Previous](#) [Save Progress](#) [Next](#)



# 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.



**Draft** Once done authoring, reviewing, and negotiating this contract, this contract must be in a Fully Executed status before it can be used. Both a Primary First Party and Primary Second Party need to be added. Both a Start and End Date are required to make this contract active.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
Version: Renewal 0, Amendment 0  
▶ Lifetime Spend (USD)  
Open Main Document

Summary

**Header**

- Commodity Codes
- Alternative Language
- Attachments
- Obligations
- Review Rounds
- Submit for Approval
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses

**Contract Header**

Contract Number \* 40020  
Contract Name \* Test Contract 074  
Contract Type \*  
Department \*  
Summary \*  
Contract Type \*  
Name \*  
Dates and Times \*  
Time Zone \*  
Start Date \*  
End Date \*

### Select Primary First Party

**Contact Information (Optional)** (Step 2 of 3)

Contract Party Name Department of Administrative Services - CP

Choose a Contact

\* Required

Kundid, David (Primary Corporate)  
Shannon, Laura (Corporate)

Add Contact

Close

### Select Primary First Party

**Contact Information (Optional)** (Step 2 of 3)

Contract Party Name Department of Administrative Services - CP

Choose a Contact Add Contact

This contact will be added to the Contract Party's profile immediately.

First Name \*  
Last Name \*  
Title  
Email  
Phone  
Country Code, Area Code, Phone Number, Phone Extension  
Mobile Phone Number  
Country Code, Area Code, Phone Number

\* Required

Next Close

# Contract Header – Contract Parties

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

**Draft** Once done authoring, reviewing, and negotiating this contract, submit it for approval. This contract must be in a Fully Executed status before it can be made active for shopping. Both a Primary First Party and Primary Second Party need to be assigned to this contract before it can be made active for shopping. Both a Start and End Date are required to make this contract active for shopping. Contract Actions

This Contract is currently checked out to You It is locked and cannot be edited by others until you check it in. Check In

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

**Header**

- Commodity Codes
- Alternative Language 0
- Attachments 1
- Obligations 0
- Review Rounds 0
- Submit for Approval
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Comments 0

**Contract Header** View XML History ?

Contract Number \* 40020 Parent Contract Type to filter...  
Contract Name \* Test Contract 074 Show on Vendor Portal  Yes  No  Inherit From General Contract Settings -- Current Setting: Yes  
Contract Type \* Master Agreement - Standard - Test  
Department \* Administrative Services State of Iowa  
Summary \* 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.

**Contract Parties** Add First Party Add Second Party

Name	Currently Visible	Type	Contact	Contract Address
Department of Administrative Services		Agency (Primary)	-	-

**⚠ Your contract must have a Primary Second Party.**

**Dates and Renewal**

Time Zone \* CDT/CST - Central Standard Time (US/Cent) Renewals Remaining  
Start Date \* mm/dd/yyyy hh:mm a Renewal Term  
 Update Start Date Upon Execution Auto-Rew  Yes  No  
End Date \*

★ Required Previous Save Progress Next



# 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 ▾

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

< > 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](mailto: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 ▾
<input checked="" type="radio"/>	HP Inc 	Vendor	- <a href="#">View Additional Addresses</a>
<input type="radio"/>	Hewlett Packard Financia 	Vendor	-

### Vendor Details

 In Network

 Active

 Non-Catalog 

<b>HP Inc</b>	
Legal Name	HP Inc
DBA	HP Inc
Aliases	-
Vendor No.	00002145540
3rd Party Ref No.	-
Date of Last Order	-
Diversity	-
Registration Status	None



# 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.**

**Select Primary Second Party**

**Contact Information (Optional)** (Step 2 of 3)

Contract Party Name HP Inc

Choose a Contact

★ Required

Bennis, Aaron (Primary Sales)  
Bennis, Aaron (Sales)  
Lee, Debra (Primary Corporate)  
Add Contact

Close

# 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					<a href="#">Add First Party</a>	<a href="#">Add Second Party</a>
Name	Currently Visible	Type	Contact	Contract Address		
<a href="#">Department of Administrative Services - CP</a>		Agency (Primary)	<a href="#">Betty Buyer</a>	1305 East Walnut St. Level 3 Des Moines, Iowa, 50319 US		
<a href="#">HP Inc</a>	✘	Vendor (Primary) 	<a href="#">Aaron Bennis</a>	14231 TANDEM BLVD AUSTIN, TX, 78728-6612		



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# 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.

The screenshot shows a form titled "Dates and Renewal" with the following fields and annotations:

- Time Zone \***: A dropdown menu set to "CDT/CST - Central Standard Time (US/Cent)".
- Start Date \***: A date input field with a calendar icon, highlighted with a red box. Below it is the format "mm/dd/yyyy hh:mm a" and a checkbox labeled "Update Start Date Upon Execution" with a question mark icon.
- End Date \***: A date input field with a calendar icon, highlighted with a red box. Below it is the format "mm/dd/yyyy hh:mm a".
- Renewals Remaining**: A text input field, highlighted with a red box.
- Renewal Term**: A dropdown menu, highlighted with a red box.
- Auto-Renew**: Radio buttons for "Yes" and "No", with "No" selected.
- Additional Details**: A section with a downward arrow icon, containing two text areas:
  - Details**: A text area with a "2000 characters remaining" indicator. A red arrow points to it from the right.
  - Searchable Keywords**: A text area with a "2500 characters remaining" indicator. A red arrow points to it from the right.



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# 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 <sup>★</sup> ⓘ All State Agencies, Governmental Entities & Political Subdivisions × 🔍

Contract Websites  2000 characters remaining

PunchOut or Hosted Catalog Enabled <sup>★</sup> ⓘ  Yes  No

Renewals Remaining ⓘ  ▲ ▼

[Field Validation](#)



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# 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.

**Terms and Conditions**

Primary Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Additional Terms and Conditions ★ ⓘ

Terms and Conditions Website(s) ⓘ

Payment Terms ★ ⓘ

Shipping Terms - Free on Board (FOB) ★ ⓘ

2000 characters

General Terms and Conditions for Goods  
General Terms and Conditions for Services  
Terms and Conditions for Goods & Services  
Design and Construction Resources - Consensus Doc 802  
Design and Construction Resources - Consensus Doc 803  
Other - See Attached

Federal Terms and Conditions  
Information Technology Terms and Conditions  
IT -as-a-Service (SaaS, IaaS, PaaS) Terms and Conditions  
Iowa HSEMD Terms & Conditions  
Iowa DHHS Terms & Conditions  
Iowa Department of Transportation Terms and Conditions  
Design and Construction Resources - Consensus Doc 802  
Design and Construction Resources - Consensus Doc 803  
Intentionally Left Blank  
Other - See Attached

# 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 ★ ⓘ	<input type="text"/>
Additional Terms and Conditions ★ ⓘ	<input type="text"/>
Additional Terms and Conditions ★ ⓘ	<input type="text"/>
Additional Terms and Conditions ★ ⓘ	<input type="text"/>
Terms and Conditions Website(s) ⓘ	<input type="text"/> 2000 characters remaining
Payment Terms ★ ⓘ	<input type="text"/>
Shipping Terms - Free on Board (FOB) ★ ⓘ	<input type="text"/>



# Contract Header – T&Cs

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

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

FOB Destination, Freight Prepaid
FOB Origin
FOB - Other
Not Applicable

### 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) ★ ⓘ

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



# 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 ★ ⓘ

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



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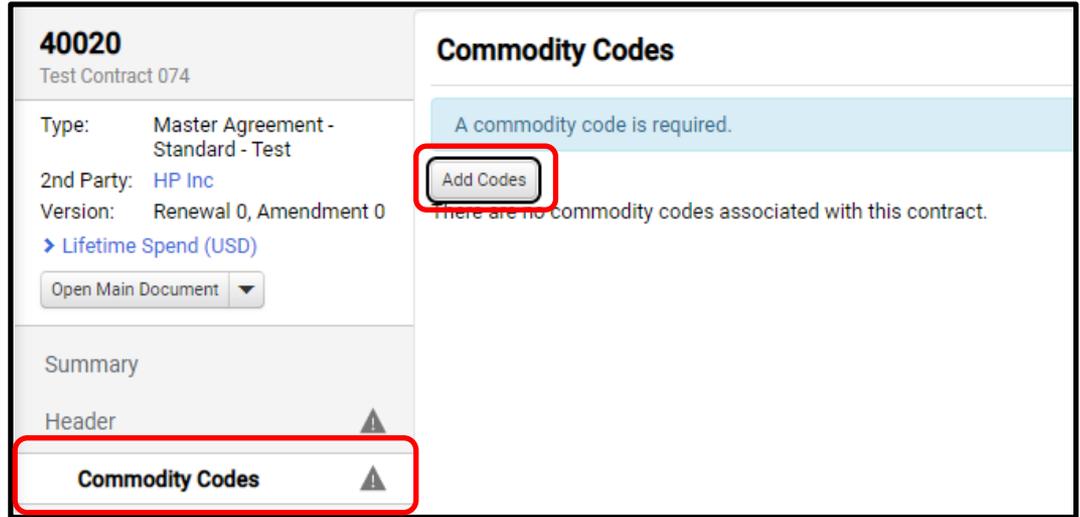
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# Contracts Wizard

## Commodity Codes

# Contract Wizard - Commodity Codes

The next Section in the Wizard is Commodity Codes. Add one or more Commodity Codes that apply to the contract.



40020  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: HP Inc  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary  
Header

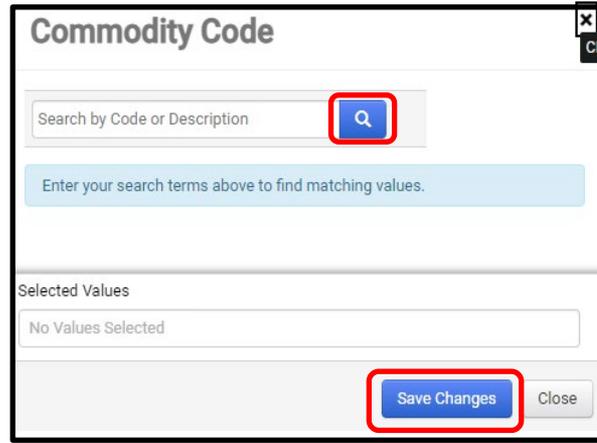
**Commodity Codes**

**Commodity Codes**

A commodity code is required.

Add Codes

There are no commodity codes associated with this contract.



**Commodity Code**

Search by Code or Description

Enter your search terms above to find matching values.

Selected Values  
No Values Selected

Save Changes Close

Click on the search button and search by code or description. **Save Changes** when done.



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# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: HP Inc  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document ▾

Summary  
Header ⚠  
Commodity Codes ✓  
Alternative Language 0  
**Attachments 1**

### Attachments

View XML | History | ?

General (1) Internal Only (0) Obligations (0)

Add Attachments ▾

👑 Main Document

Print Order ▲	Attachment ▲	Print with Full Contract ▲	Show on Vendor Portal ▲	Version ▲	Size ▲	Date Uploaded ▲	Actions ▼
1 👑	<a href="#">Main Document</a> 2023-01-30 ContractTemplate-1675110990291-1853911 - Master Agreement Template - Standard (version 1).docx	✓	✓	1	85 KB	4/5/2023 3:44:50 PM	Actions ▼



# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: HP Inc  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary  
Header  
Commodity Codes  
Alternative Language  
Attachments

### Attachments

View XML | History | ?

General (1) Internal Only (0) Obligations (0)

Add Attachments

Main Document

Print Order	Attachment	Print with Full Contract	Show on Vendor Portal	Version	Size	Date Uploaded	Actions
1	<a href="#">Main Document</a> 2023-01-30 ContractTemplate-1675110990291-1853911 - Master Agreement Template - Standard (version 1).docx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	85 KB	4/5/2023 3:44:50 PM	Actions



# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: HP Inc  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document ▾

Summary  
Header   
Commodity Codes   
Alternative Language   
Attachments 

### Attachments

General (1) Internal Only (0) Obligations (0)

Add Attachments ▾

Print Order ▲	Attachment ▲	Print with Full Contract ▲	Show on Vendor Portal ▲	Version ▲	Size ▲	Date Uploaded ▲	
1 	 Main Document 2023-01-30 ContractTemplate-1675110990291-1853911 - Master Agreement Template - Standard (version 1).docx			1	85 KB	4/5/2023 3:44:50 PM	

Edit Properties  
Download  
Upload New Version  
Generate New Version  
**Unassign as Main Document**  
Delete

 Main Document



# 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.



 <b>State of Iowa Master Agreement</b> Contract Declaration and Execution 40020			
<b>Contract #</b>	40020		
<b>Contract Name</b>	Test Contract 074		
<b>Start Date</b>	4/1/2023 12:00 AM		
<b>End Date</b>	3/31/2024 11:59 PM		
<b>Renewal Term</b>	1 Years		
<b>Renewals Remaining</b>	3		
<b>Vendor/Contractor</b>	<u>SOIJAGGAERTEST</u>		
<b>PunchOut or Hosted Catalog Vendor</b>	No		
<b>Contract Manager</b>	<del>SOIJAGGAERTEST</del>	SOIJAGGAERTEST@gmail.com	+1 515-330-7325
<b>Other Contact</b>			
<b>Issuer</b>	Department of Administrative Services - CP		
<b>Contract Manager</b>	David Kundid	david.kundid@iowa.gov	+1 515-745-2796
<b>Authorized Departments</b>	All State Agencies, Governmental Entities & Political Subdivisions		
<b>Shipping Terms</b>	FOB Destination, Freight Prepaid		
<b>Payment Terms</b>	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.			



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# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

- Header ✓
- Commodity Codes ✓
- Alternative Language 0
- Attachments 1
- Obligations 0**

**Obligations** ⓘ

[View XML](#) | [History](#) | [📄](#) | [?](#)

[Add Obligation](#) ▼

Show Recurring Obligations As: Occurrences ▼

Due Date Between:   [More Options](#)  
mm/dd/yyyy hh:mm a

Clear [Search](#)

🔄 Occurrence in a Series

No results found



# Contract Obligations

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

**Obligations** ⓘ

**Add Obligation** ▼

Show Recurring Obligations As

Due Date Between   [More Options](#)

[Clear](#) [Search](#)

**Add Obligation** ▼

Add New Obligation

**Add Obligation from Library**

**Select Values**

[Search](#)

Enter your search terms above to find matching values.

Selected Value

[Close](#)

**Add Obligation from Library**

**Choose Obligation** Step 1 of 3

Obligation \*  [Search](#)

\* Required [Next](#) [Close](#)



# 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.

## Select Values

Name	
Quarterly Sales Report	Select
Administration Fee	Select
Insurance Certificate Renewal (COI)	Select

Selected Value

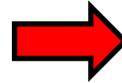
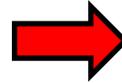


# Contract Obligations

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 X

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)

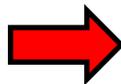
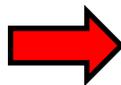
\* Required

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.



### 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 X

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

End \* By Contract End Date

Due \* 11:59 PM  
hh:mm a

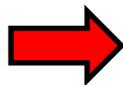
Time Zone \*  Same as Contract (CST)

\* Required

Previous Next Close

# Contract Obligations

The 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 X

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.

**Add Obligation from Library**

**Owners and Stakeholders** Step 3 of 3

**Add New**

Role ▲	Person ▼	Task/Notes	Send Notifications	
First Party Owner	Contract Manager	Review COI	Advance Notice, Due Date, Past Due Notice, Completed	Actions ▲

**Advance Notice Settings**

Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
45 ▲▼	30 ▲▼	15 ▲▼

\* Required

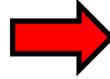
Previous Save Changes Close

# 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.



**Add Owner or Stakeholder**

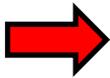
Role \*

Person \*

Task/Notes   
 1000 characters remaining

Send Notifications   
  Advance Notice   
  Due Date   
  Past Due Notice   
  Completed

\* Required



**Add Owner or Stakeholder**

Role \*

Second Party Contact \*

Task/Notes   
 1000 characters remaining

Send Notifications   
  Advance Notice   
  Due Date   
  Past Due Notice   
  Completed

\* Required

# 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.

Name	
JAGGAERTEST, SOI (Primary Corporate)	Select
owner (Sales)	Select
JAGGAERTEST, SOI (Sales)	Select

Selected Value

No Value Selected

Close

# 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 Contact ★

Task/Notes

1000 characters remaining

Send Notifications  Advance Notice  Due Date  Past Due Notice  Completed

★ Required



# 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**.

## Add Obligation from Library

Owners and Stakeholders Step 3 of 3

Add New

Role ▲	Person ▼	Task/Notes	Send Notifications	
First Party Owner	Contract Manager	Review COI	Advance Notice, Due Date, Past Due Notice, Completed	Actions ▲
Second Party Stakeholder	JAGGAERTEST, SOI (Primary Corporate)	-	Advance Notice, Due Date, Past Due Notice	Actions ▲

### Advance Notice Settings

Advance Notice #1 (In Days)	Advance Notice #2 (In Days)	Advance Notice #3 (In Days)
45 ▲▼	30 ▲▼	15 ▲▼

\* Required

Previous **Save Changes** Close

# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
▶ Lifetime Spend (USD)  
Open Main Document ▼

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 1  
**Obligations 1**  
Review Rounds 0  
Submit for Approval  
eProcurement Setup  
Budget and Spend  
Applies To  
Goods and Services  
PO Clauses  
Comments 0

### Obligations 1

View XML | History | ?

Add Obligation ▼

Show Recurring Obligations As Occurrences ▼

Due Date Between   More Options  
mm/dd/yyyy hh:mm a mm/dd/yyyy hh:mm a

Clear Search

Occurrence in a Series

1-1 of 1 Results 200 Per Page ▼

Obligation Name ▼	Obligation Id ▼	Status ▼	Due Date ▼	Complete Date ▼	First Party Owner	Actions ▼
Insurance Certificate Renewal (COI) 📄	248168	Future	1/1/2024 11:59 PM CST ↻		-	

◀ Previous Next ▶



# Contract Obligations

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

The screenshot shows a web interface for managing obligations. At the top, there is a header "Obligations" with a help icon. To the right of the header are links for "View XML", "History", and a question mark. Below the header is a blue button labeled "Add Obligation". Underneath is a label "Show Recurring Obligations As" followed by a dropdown menu currently set to "Series", which is highlighted with a red box. Below this is a summary bar showing "1-1 of 1 Results" and a settings icon with "200 Per Page". The main content is a table with the following columns: "Obligation Name", "Obligation Id", "Status", "Due Date", "Complete Date", and "First Party Owner". There is also an "Actions" column. The table contains one row for "Insurance Certificate Renewal (COI)" with ID "248168" and status "Future". The "Due Date" column contains the text: "Every 1 year in January on the 1st of the month at 11:59 PM", "Start on 4/30/2023 CDT (custom)", and "End on 3/31/2024 CDT (contract end)".

Obligation Name	Obligation Id	Status	Due Date	Complete Date	First Party Owner	Actions
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.

The screenshot displays the 'Obligations' section for contract 40020. On the left, a sidebar lists various contract details and metrics. The main area shows a table of obligations with one entry: 'Insurance Certificate Renewal (COI)'. The 'Actions' button for this entry is highlighted with a red box. A red arrow points from this button to a magnified view of the 'Actions' dropdown menu, where the 'Mark as Complete' option is also highlighted with a red box.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
▶ Lifetime Spend (USD)  
Open Main Document

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 1  
**Obligations 1**  
Review Rounds 0  
Submit for Approval  
eProcurement Setup  
Budget and Spend  
Applies To  
Goods and Services  
PO Clauses  
Comments 0

**Obligations** ⓘ  
Add Obligation  
Show Recurring Obligations As Occurrences  
Due Date Between [ ] [ ] More Options  
Clear Search

1-1 of 1 Results 200 Per Page

Obligation Name	Obligation Id	Status	Due Date	Complete Date	First Party Owner	Actions
Insurance Certificate Renewal (COI)	248168	Future	1/1/2024 11:59 PM CST		-	Actions

Properties  
**Mark as Complete**  
Cancel Occurrence  
Series ▶

◀ Previous Next ▶

# 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.



## Mark as Complete ⓘ

**Obligation Name** Insurance Certificate Renewal (COI)

**Status** Future

**Due Date** 1/1/2024 11:59 PM CST

**Completed Date \***  📅 ⌚  
mm/dd/yyyy hh:mm a

**Notes**   
700 characters remaining

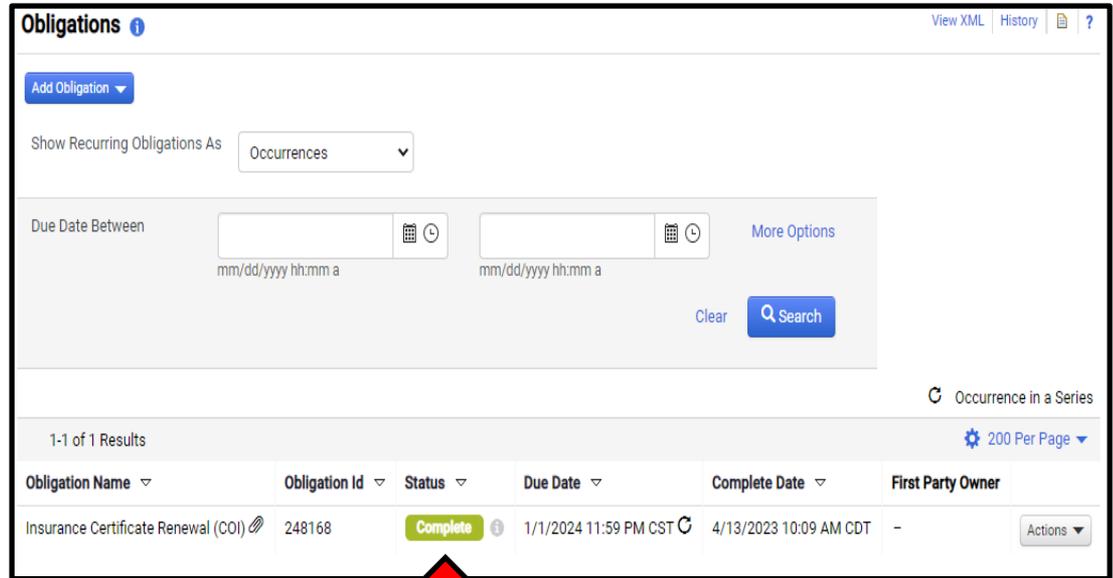
**Attachments \***  *Drop files to attach, or browse.*  
Maximum upload file size: 50.0 MB

★ Required Mark as Complete Close

# 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.



The screenshot displays the 'Obligations' interface. At the top, there is a header 'Obligations' with an information icon. Below the header, there is a search bar with 'Add Obligation' and a dropdown menu. The 'Show Recurring Obligations As' dropdown is set to 'Occurrences'. There are two date input fields for 'Due Date Between' with calendar icons and a 'More Options' link. A 'Clear' button and a 'Search' button are also present. Below the search area, there is a 'Refresh' icon and the text 'Occurrence in a Series'. The table shows '1-1 of 1 Results' and a '200 Per Page' dropdown. The table has columns for 'Obligation Name', 'Obligation Id', 'Status', 'Due Date', 'Complete Date', and 'First Party Owner'. The first row shows 'Insurance Certificate Renewal (COI)' with an attachment icon, '248168', a green 'Complete' status with an information icon, '1/1/2024 11:59 PM CST' with a refresh icon, '4/13/2023 10:09 AM CDT', and a hyphen for the first party owner. An 'Actions' dropdown is at the end of the row. A large red arrow points to the 'Complete' status.

Obligation Name	Obligation Id	Status	Due Date	Complete Date	First Party Owner
Insurance Certificate Renewal (COI)	248168	Complete	1/1/2024 11:59 PM CST	4/13/2023 10:09 AM CDT	-



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# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOLJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

**Review Rounds** View XML | History | ?

This contract has 0 completed rounds of review.

[Create Manual Internal Round](#) [Create External Round](#)

Summary	
Header	✓
Commodity Codes	✓
Alternative Language	0
Attachments	1
Obligations	1
<b>Review Rounds</b>	<b>0</b>

# 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).

A screenshot of a web application interface for contract management. The main title is "40020" with a subtitle "Test Contract 074". On the left is a navigation menu with items like "Summary", "Header", "Commodity Codes", "Alternative Language", "Attachments", "Obligations", "Review Rounds", "Submit for Approval", "eProcurement Setup", "Budget and Spend", "Applies To", "Goods and Services", and "PO Clauses". The "eProcurement Setup" item is highlighted with a red box. The main content area is titled "eProcurement Setup" and contains several sections: "Automatically Apply Purchases from this Vendor to this Contract" with radio buttons for "Yes" and "No" (selected), "Blanket PO Number" with an input field, "Allow Portal Invoice Enabled Vendors to Edit Contract Item Price" with radio buttons for "Yes" and "No" (selected), "Payment Terms" with a section for "Early Payment Terms" including "Override Discount Terms", "Standard Payment Terms" (a dropdown menu), "Discount %", "Days", "Type", and "Days After", "Pricing" with a message "This vendor is not configured for catalog pricing.", and "Vendor Visible Custom Fields" with radio buttons for "Yes" and "No" (selected). The top right corner has links for "View XML", "History", and a help icon.

# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 1  
Obligations 1  
Review Rounds 0  
Submit for Approval

**eProcurement Setup** View XML | History | ?

Automatically Apply Purchases from this Vendor to this Contract  Yes  No

Blanket PO Number

Allow Portal Invoice Enabled Vendors to Edit Contract Item Price  Yes  No

**Payment Terms** ⓘ

Early Payment Terms  Override Discount Terms  
Standard Payment Terms   
Discount %  
Days  
Type  
Days After

**Pricing** ⓘ  
This vendor is not configured for catalog pricing.

**Vendor Visible Custom Fields** ⓘ

Do you want portal invoicing enabled Vendors to complete the selected Custom Field on Invoices created from this Contract?  Yes  No



# 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.

### Vendor Visible Custom Fields ?

Do you want portal invoicing enabled Vendors to complete the selected Custom Field on Invoices created from this Contract?  Yes  No

Available Custom Field *There is no vendor visible custom field configured*

---

### Code Defaults on Invoice ?

These code defaults are applied to invoice line items from this contract.

#### Accounting Codes Add

Department	Fund	Appropriation	Unit
<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>

---

### Display Options in Browse Contracts ?

Show Generic Non-Catalog Item in Browse Contracts  Yes  No  Inherit From Contract Type -- Current Setting: Yes

[Save Changes](#)

# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

Header

Commodity Codes

Alternative Language  0

Attachments  1

Obligations  1

Review Rounds  0

Submit for Approval

eProcurement Setup

**Budget and Spend**

Applies To

Goods and Services

PO Clauses

Comments  0

Communication Center  0

Users and Contacts

Notifications

### Budget and Spend

View XML | History | ?

**For This Version**

Budget

Contract Spend  (0% of 0.00)

Enforce Budget  Yes  No

**Lifetime Summary**

1

Actual Spend by Version (USD)

Renewal 0, Amendment 0 (This Version)

0 Contract PR PO Invoice

**Actual Spend by Version (USD)**

Version Numbers	Status	Contract Spend	PR Spend	PO Spend	Invoice Spend	
Renewal 0, Amendment 0 <b>This Version</b>	Draft	0.00 (0% of 0.00)	0.00 (0% of 0.00)	0.00 (0% of 0.00)	0.00 (0% of 0.00)	<input type="button" value="Adjust"/>

**Limits Per Requisition**

	Minimum Allowed	Maximum Allowed
Contract Spend	<input type="text"/>	<input type="text"/>
Line Item Quantity	<input type="text"/>	<input type="text"/>



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# 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**.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

Header ✓

Commodity Codes ✓

Alternative Language 0

Attachments 1

Obligations 1

Review Rounds 0

Submit for Approval

eProcurement Setup

Budget and Spend

**Applies To**

**Applies To** View XML History ?

Department or Role Additional Users Product/SKU UNSPSC Fulfillment Center

Grant access to this contract using Departments and Roles

**Available Departments** ?

- AEA Purchasing (267)
- Agriculture and Land Stewardship (009)
- All State Agencies (ALL)
- Anamosa-Farm Accounts (251)
- Attorney General (112)
- Auditor of State (126)
- Board of Parole (547)
- Board of Regents (615)
- CBC all districts (221-228)
- Civil Rights Commission (167)
- College Aid (284)

**Departments with access to this Contract** ?

--Apply to All--

**Available Roles** ?

- Agency Buyer
- Central Procurement Buyer
- Agency Administrator
- Polisub Buyer
- User
- Admin
- System Administrator
- Approver
- Requester

**Roles with access to this Contract** ?

--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.



## 40020

Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

Header

Commodity Codes

Alternative Language

Attachments

Obligations

Review Rounds

Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

**Goods and Services**

## 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

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

The screenshot displays the 'Goods and Services' interface. At the top right, there are links for 'View XML', 'History', a document icon, and a question mark. Below this, there are three tabs: 'Forms', 'Ordering Instructions', and 'Non-Catalog Items', with the 'Non-Catalog Items' tab highlighted by a red box. Underneath the tabs, there are two buttons: 'Manage Non-Catalog Items' and 'View Import/Export Results'. At the bottom left, the text reads 'No non-catalog items on this contract.' At the bottom right, there is a blue button labeled 'Add Contract Non-Catalog Item', which is highlighted by a red box.

# Contract Goods and Services

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

The top line with the **bold** text 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 Non-Catalog Item**

Description	Catalog Number	Size	Price	Packaging (UOM)
<input type="text"/> 254 characters remaining <a href="#">expand</a>   <a href="#">clear</a>	<input type="text"/>	<input type="text"/> For example: 1/g, 1/L, 1 cm System size: none	<input type="text"/>	<input type="text"/> For example: 1/EA, 1 CS System packaging: none

Promote in product search

Color

Delivery Lead Time (Days)

Minimum Quantity on PR line

Maximum Quantity on PR line

UNSPSC

Contracted Quantity   Enforce Contracted Quantity

Total Purchased Quantity 0

Category Name *no value*  
[select category](#)  
[assign category from UNSPSC](#)

Commodity Code *no value*  [Override](#)

Searchable Keywords   
700 characters remaining [expand](#) | [clear](#)

Long Description   
4000 characters remaining [expand](#) | [clear](#)

Manufacturer Name

Manufacturer Part Number

Item Master Id

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Upload new image  No file chosen

Image URL

Attribute	Value
Emergency Supplies	<input type="checkbox"/>



# 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 Non-Catalog Item**

Description	Catalog Number	Size	Price	Packaging (UOM)
<input type="text"/> 254 characters remaining <a href="#">expand</a>   <a href="#">clear</a>	<input type="text"/>	<input type="text"/> For example: 1/g, 1/L, 1 cm System size: none	<input type="text"/>	<input type="text"/> For example: 1/EA, 1 CS System packaging: none

Promote in product search

Color

Delivery Lead Time (Days)

Minimum Quantity on PR line

Maximum Quantity on PR line

UNSPSC

Contracted Quantity   Enforce Contracted Quantity

Total Purchased Quantity 0

Category Name *no value*  
[select category](#)  
[assign category from UNSPSC](#)

Commodity Code *no value*  [Override](#)

Searchable Keywords   
700 characters remaining [expand](#) | [clear](#)

Long Description   
4000 characters remaining [expand](#) | [clear](#)

Manufacturer Name

Manufacturer Part Number

Item Master Id

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Upload new image  No file chosen

Image URL

Attribute	Value
Emergency Supplies	<input type="checkbox"/>



# 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 Non-Catalog Item**

Description	Catalog Number	Size	Price	Packaging (UOM)
<input type="text"/> 254 characters remaining <a href="#">expand</a>   <a href="#">clear</a>	<input type="text"/>	<input type="text"/> For example: 1/g, 1L, 1 cm System size: none	<input type="text"/>	<input type="text"/> For example: 1/EA, 1 CS System packaging: none

Promote in product search

Color

Delivery Lead Time (Days)

Minimum Quantity on PR line

Maximum Quantity on PR line

UNSPSC

Contracted Quantity   Enforce Contracted Quantity

Total Purchased Quantity 0

Category Name *no value*  
[select category](#)  
[assign category from UNSPSC](#)

Commodity Code *no value*  Override ⓘ

Searchable Keywords   
700 characters remaining [expand](#) | [clear](#)

Long Description   
4000 characters remaining [expand](#) | [clear](#)

Manufacturer Name

Manufacturer Part Number

Item Master Id

**Product Flags**

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Upload new image  No file chosen

Image URL

Attribute	Value
Emergency Supplies	<input type="checkbox"/>



# 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.

The screenshot shows the 'Goods and Services' interface. At the top, there are tabs for 'Forms', 'Ordering Instructions', and 'Non-Catalog Items' (which is selected and highlighted with a red box). Below the tabs, there are buttons for 'Manage Non-Catalog Items' and 'View Import/Export Results'. A search button labeled '> Search Contract Non-Catalog Items' is also highlighted with a red box. On the right side, there is a blue button 'Add Contract Non-Catalog Item' and a link 'Remove Selected'. The main content is a table with the following columns: Catalog Number, Description, Category Name, Manufacturer Name, Packaging (UOM), Size, Contracted Quantity, Total Purchased Quantity, and Price. The table contains two rows: one with Catalog Number '01' (highlighted with a red box) and Description 'Test description', and another with Catalog Number '02' and Description 'Test item 2'.

Catalog Number ▲	Description ▲	Category Name	Manufacturer Name ▲	Packaging (UOM)	Size	Contracted Quantity	Total Purchased Quantity	Price	
01	Test description			EA	none		0	100.00	<input type="checkbox"/>
02	Test item 2			EA	none		0	200.00	<input type="checkbox"/>



# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)

Open Main Document

Summary

Header ✓

Commodity Codes ✓

Alternative Language 0

Attachments 1

Obligations 1

Review Rounds 0

Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

**Goods and Services**

PO Clauses

**Goods and Services** View XML | History | ?

Forms [Ordering Instructions](#) **Non-Catalog Items**

[Manage Non-Catalog Items](#) [View Import/Export Results](#)

**Contract Non-Catalog Items Import / Export Request**  
For imports, find a template and instructions below.

Action \*

Description \*

[Contract Non-Catalog Items Import/Export Template](#) [Click to download...](#)

[Detailed Contract Non-Catalog Items Import Instructions](#)

**Recent Activity** Refresh this Page

To see the latest status of the last five (5) requests submitted, click Refresh. If the submitted request is not visible, view all submitted requests by clicking the "Click here for additional requests..." link. To view the output file for a completed request, click the file name or the "Click to download..." link so the file can be viewed or saved.

✗ No matching records found.

[Click here for additional requests...](#)



# 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**.

**Goods and Services**

Forms    Ordering Instructions    Non-Catalog Items

Manage Non-Catalog Items    View Import/Export Results

**Contract Non-Catalog Items Import / Export Request**

For imports, find a template and instructions below.

Action ★ Validate ▾

Description ★

File Name ★ Choose File No file chosen

Submit

Contract Non-Catalog Items Import/Export Template

[Detailed Contract Non-Catalog Items Import Instructions](#)

Click to download...

# 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.

**Goods and Services** [View XML](#) [History](#)

[Forms](#) [Ordering Instructions](#) **Non-Catalog Items**

[Manage Non-Catalog Items](#) [View Import/Export Results](#)

[Search Contract Non-Catalog Items](#) [Add Contract Non-Catalog Item](#)

[Remove Selected](#)

Catalog Number ▲	Description ▲	Category Name	Manufacturer Name ▲	Packaging (UOM)	Size	Contracted Quantity	Total Purchased Quantity	Price	<input type="checkbox"/>
01	Test description			EA	none		0	100.00	<input type="checkbox"/>
02	Test item 2			EA	none		0	200.00	<input type="checkbox"/>

# 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.**



## 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 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**





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# Contracts Wizard

## PO Clauses

# 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.

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOLJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

- Header
- Commodity Codes
- Alternative Language
- Attachments
- Obligations
- Review Rounds
- Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

**PO Clauses**

Clause No.	Clause Name	Clause Text	Assigned
CONSENSUS_802	Design & Construction Consensus Docs 802	The parties agree to comply with the terms and conditions on the following web site which are by ... <a href="#">more info</a>	<input type="checkbox"/>
CONSENSUS_803	Design & Construction Consensus Docs 803	The parties agree to comply with the terms and conditions on the following web site which are by ... <a href="#">more info</a>	<input type="checkbox"/>
FEDERAL_TERMS	Federal Terms & Conditions	The parties agree to comply with the terms and conditions on the following web site which are by ... <a href="#">more info</a>	<input type="checkbox"/>
Iowa DHHS Terms & Conditions	Iowa DHHS Terms & Conditions	The parties agree to comply with the terms and conditions on the following attachment which are b... <a href="#">more info</a>	<input type="checkbox"/>
Iowa DOT Terms	Iowa Department of Transportation Terms and Conditions	The parties agree to comply with the terms and conditions on the following attachment which are b... <a href="#">more info</a>	<input type="checkbox"/>
Iowa HSEMD Terms & Conditions	Iowa HSEMD Terms & Conditions	The parties agree to comply with the terms and conditions on the following attachment which are b... <a href="#">more info</a>	<input type="checkbox"/>
IT as a Service Terms	IT -as-a-Service (SaaS, IaaS, PaaS) Terms and Conditions	The parties agree to comply with the terms and conditions on the following web site which are by ... <a href="#">more info</a>	<input type="checkbox"/>
IT Terms & Conditions	Information Technology Terms and Conditions	The parties agree to comply with the terms and conditions on the following web site which are by ...	<input type="checkbox"/>

REFERENCED\_TERMS      Referenced Terms      The parties agree to comply with the terms and conditions pursuant to the bid process which are b... [more info](#)     





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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.



**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[Lifetime Spend \(USD\)](#)  
Open Main Document

Summary

Header ✓

Commodity Codes ✓

Alternative Language 0

Attachments 1

Obligations 1

Review Rounds 0

Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

PO Clauses

**Comments** 0

**Comments**

Start New Thread

There are no comments for this contract.

**Edit Comment**

Subject \* test

Message \* test

4996 characters remaining

Send Notification To Name, User Name, Email

\* Required Save Close



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# 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.

The screenshot displays the 'Communication Center' for contract 40020 (Test Contract 074). The interface is divided into two main sections: a left-hand navigation pane and a right-hand content area.

**Left-hand navigation pane:**

- 40020** (Test Contract 074)
- Type: Master Agreement - Standard - Test
- 2nd Party: SOIJAGGAERTEST
- Dates: 4/1/2023 - 3/31/2024
- Version: Renewal 0, Amendment 0
- > Lifetime Spend (USD)
- Open Main Document (dropdown)
- Summary**
- Header (✓)
- Commodity Codes (✓)
- Alternative Language (0)
- Attachments (1)
- Obligations (1)
- Review Rounds (0)
- Submit for Approval
- eProcurement Setup**
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses
- Comments (1)
- Communication Center (0)** (highlighted with a red box)

**Right-hand content area:**

- Communication Center** (with an information icon)
- Internal (0) External (0) (highlighted with a red box)
- Add Internal Message (button)
- There are no communications on this contract yet (message box)

# 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).



The screenshot displays the '40020' contract page for 'Test Contract 074'. The left sidebar lists various contract sections with status indicators: Summary, Header (checked), Commodity Codes (checked), Alternative Language (0), Attachments (1), Obligations (1), Review Rounds (0), Submit for Approval, eProcurement Setup, Budget and Spend, Applies To, Goods and Services, PO Clauses, Comments (1), and Communication Center (0). The main area shows the 'Communication Center' with tabs for 'Internal (0)' and 'External (0)'. A red box highlights the 'Add Internal Message' button. Below it, a message states 'There are no communications on this contract yet'. A red arrow points from this button to the 'Internal Communication' form. The form includes a 'Subject' field, a 'Body' field with a rich text editor (formatting options like bold, italic, underline, and font size), and sections for 'Recipients (Optional)' and 'Attachments (Optional)'. A red box highlights the 'Create' button at the bottom right of the form.

# 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**.



The screenshot displays the "40020" contract page for "Test Contract 074". The left sidebar lists various contract details and metrics, with "Communication Center" showing 0. The main content area shows an email message titled "Test Internal Message" with a subject line and subscribers listed. An attachment named "BlueAlly COI 123022.pdf" is visible. A red box highlights the attachment name, and another red box highlights the "Actions" dropdown menu. A red arrow points from the "Actions" menu to a modal window titled "Add/Update Attachment". The modal contains options for "Select Email Attachment" (selected as "BlueAlly COI 123022.pdf") and "Select Contract Attachment" (selected as "New Attachment"). A text input field contains the word "Update". At the bottom of the modal are "Save" and "Close" buttons.

# Contract Communication Center

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

**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
> Lifetime Spend (USD)  
Open Main Document

Summary

- Header ✓
- Commodity Codes ✓
- Alternative Language 0
- Attachments 1
- Obligations 1
- Review Rounds 0

Submit for Approval

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

PO Clauses

Comments 1

**Communication Center** 0

**Communication Center** 1

Internal (0) External (0)

Start External Communication

There are no communications on this contract yet





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# 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.



**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
[> Lifetime Spend \(USD\)](#)  
View Contract

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 2  
Obligations 1  
Review Rounds 0  
Approvals  
eProcurement Setup  
Budget and Spend  
Applies To  
Goods and Services  
PO Clauses  
Comments 1  
Communication Center 1  
**Users and Contacts**  
Notifications  
Contract Family

**Users and Contacts**

Contract Managers \* Full control over this contract [Edit Users](#)  
Shannon, Laura

Invoice Approvers Approve associated invoices [Edit Users](#)  
None

Stakeholders View this contract and receive notifications [Edit Users](#)  
None

> Users from Department (15) [Make Confidential](#)

> Visibility Controls

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

★ Required [Save Changes](#)

# 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).

The screenshot displays a user management interface for a contract. At the top, a section titled "Users from Department (15)" is highlighted with a red box. To the right of this section is a "Make Confidential" button, also highlighted with a red box. Below the section header, there are two main categories of users:

- Contract Administrators:** Administrators have full control over this contract.
  - Role: Admin
  - Role: Procurement
  - Role: System Administrator
  - Wendt, Karl
- Contract Managers:** Contract Managers from the department can view this contract, but cannot make changes.
  - Role: Central Procurement Buyer

A modal dialog box titled "Make Confidential" is open on the right side. It contains the following text: "This will limit visibility and access to only those users who are added directly to this contract. Are you sure you want to make this contract confidential?" At the bottom of the dialog are "Yes" and "No" buttons. A red arrow points from the "Make Confidential" button in the main interface to the dialog box.

# 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**”.

**Visibility Controls**

When a user who is not a Contract Manager on this contract views the "Contract Summary" for this contract, what view do you want them to see?

Users Who May Manage Other Contracts  [Preview](#)

All Other Users  [Preview](#)

# 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:	
	<i>None</i>	
	Inherited on all contracts for this vendor	
	Shannon, Laura	



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# 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).



**40020**  
Test Contract 074

Type: Master Agreement - Standard - Test  
2nd Party: SOIJAGGAERTEST  
Dates: 4/1/2023 - 3/31/2024  
Version: Renewal 0, Amendment 0  
▶ Lifetime Spend (USD)  
View Contract

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 3  
Obligations 1  
Review Rounds 0  
Approvals  
eProcurement Setup  
Budget and Spend  
Applies To  
Goods and Services  
PO Clauses  
Comments 1  
Communication Center 1  
Users and Contacts

**Notifications** View XML | History | ?

Who should receive each notification type?

Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Department	Contract	Department	
Budget Exceeded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date - Advance Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Advance Notice Settings**

Leave a field blank to turn off that advance notice. ←

Advance Notice For...	Advance Notice #1 (In Days)	Advance Notice #2 (In Days)	Advance Notice #3 (In Days)
Start Date	<input type="text"/>		
End Date	120	90	60
Renewal Date	90	60	30

**Notifications** Spend Tier Notification Settings

# 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.**

**Spend Tier Notification Settings**

Send Spend Tier Notification For  PR spend  PO spend  Invoice spend

This contract has no notification tiers

[Add Notification Tier](#)



[Add Notification Tier](#)

**Notification Tiers**

Tier Type	Tier Amount	Description	
Amount ▾	<input type="text"/> USD	<input type="text"/>	<a href="#">Remove Tier</a>



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# Contracts Wizard

Contract Family

# 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.



**23128**  
Office Furniture and Related Service and Solutions

Type: Master Agreement - Cooperative  
2nd Party: Hon Company The  
Dates: 1/22/2023 - 1/21/2028  
Version: Renewal 0, Amendment 0  
Lifetime Spend (USD)

View Contract

Summary  
Header ✓  
Commodity Codes ✓  
Alternative Language 0  
Attachments 8  
Obligations 3  
Review Rounds 0  
Approvals

eProcurement Setup  
Budget and Spend  
Applies To  
Goods and Services  
PO Clauses

Comments 0  
Communication Center 0  
Users and Contacts  
Notifications

**Contract Family**

Contract Family

Link a Child to this Contract

Parent/Child Contracts

Contract No.	Contract Type	Primary Second Party	Total Contract Versions	View Contract Versions
23128 <b>This Contract</b>	Master Agreement - Cooperative	Hon Company The	1	Shown Below
23149	Master Agreement - Cooperative	All Makes Office Interiors	1	View Details

23128 Contract Versions (1)  
All of the following contracts are in Central Standard Time.

Status	Version Type	Version Numbers	Primary Second Party	Start Date	End Date	Create Date
Executed: In Effect	Original	Renewal 0, Amendment 0	Hon Company The	1/22/2023	1/21/2028	2/8/2023

There are no renewals or amendments.

# 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**



**23128**  
Office Furniture and Related Service and Solutions

Type: Master Agreement - Cooperative  
2nd Party: Hon Company The  
Dates: 1/22/2023 - 1/21/2028  
Version: Renewal 0, Amendment 0  
> Lifetime Spend (USD)

View Contract

Summary

Header

Commodity Codes

Alternative Language

Attachments

Obligations

Review Rounds

Approvals

eProcurement Setup

Budget and Spend

Applies To

Goods and Services

PO Clauses

Comments

Communication Center

Users and Contacts

Notifications

**Contract Family**

**Contract Family** View XML History ?

Link a Child to this Contract

Parent/Child Contracts Expand All Collapse All

Contract No.	Contract Type	Primary Second Party	Total Contract Versions	View Contract Versions
23128 <b>This Contract</b>	Master Agreement - Cooperative	Hon Company The	1	Shown Below
23149	Master Agreement - Cooperative	All Makes Office Interiors	1	<span>View Details</span>

**23128 Contract Versions (1)**  
All of the following contracts are in Central Standard Time.

Status	Version Type	Version Numbers	Primary Second Party	Start Date	End Date	Create Date
<b>Executed: In Effect</b>	Original	Renewal 0, Amendment 0	Hon Company The	1/22/2023	1/21/2028	2/8/2023

**Summary of Contract # 23128**

Open Main Document

Header		Dates And Renewal	
Contract Name *	Office Furniture and Related Service and Solutions	Start Date	1/22/2023 12:00 AM CST
Contract Type	Master Agreement - Cooperative	End Date	1/21/2028 11:59 PM CST
Department *	Administrative Services	Auto Renewal	
Agency *	Department of Administrative Services	<b>Contract Managers</b>	
Vendor *	Hon Company The	Sara Orler	sara.orler@iowa.gov +1 515423-9083
Summary *	<span>View Summary</span>		

**Additional Details**

- Contract Information
- Terms and Conditions
- Goods and/or Services Summary
- Attachments
- eProcurement, Budget, and Spend
- Applies To
- Visibility

\* Required Go to Contract Close



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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.



**40023**  
Test Contract 032

Type: Master Agreement - Standard - Test

2nd Party:  
Version: Renewal 0, Amendment 0  
▶ Lifetime Spend (USD)  
Open Main Document ▼

Summary

**Header** ▲

- Commodity Codes ▲
- Alternative Language 0
- Attachments 1
- Obligations 0
- Review Rounds 0
- Submit for Approval**
- eProcurement Setup
- Budget and Spend
- Applies To
- Goods and Services
- PO Clauses

Comments 0

Communication Center 0

Users and Contacts

Notifications

Contract Family

Submit for Approval View XML History ?

ⓧ Please complete all required sections to submit this contract.

Section	Progress	Action Needed on the Following
Header	▲ Incomplete	<ul style="list-style-type: none"><li>ⓧ PunchOut or Hosted Catalog Enabled</li><li>ⓧ Additional Terms and Conditions</li><li>ⓧ Additional Terms and Conditions</li><li>ⓧ Additional Terms and Conditions</li><li>ⓧ Primary Terms and Conditions</li><li>ⓧ Shipping Terms - Free on Board (FOB)</li><li>ⓧ Payment Terms</li><li>ⓧ Goods and/or Services Summary</li><li>ⓧ End Date</li><li>ⓧ Start Date</li><li>ⓧ Vendor</li><li>ⓧ Contract Applies To</li><li>ⓧ A commodity code is required.</li></ul>
Review Rounds	0 Required Fields Complete	

# 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**.

The screenshot displays the 'Submit for Approval' interface. At the top, a green message states: 'All sections are complete. You may submit your contract for approval.' Below this, a table shows the progress of different sections:

Section	Progress
Header	✓ Required Fields Complete
Review Rounds	0 Required Fields Complete

Below the table, the 'View Approval Steps' section is expanded, showing a flowchart of the approval process:

```
graph LR; Submitted[Submitted Future] --> Compile[Compile Robot Future]; Compile --> Approval[Contract Approval Future View approvers]; Approval --> Finish[Finish]
```

At the bottom right, there is a 'Submit for Approval' button, which is highlighted with a red box. A 'Previous' button is also visible to its left.



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# 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.





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# 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.

The screenshot displays the IMPACS contract management interface. At the top, a status bar indicates the contract is "Executed: In Effect" and "Renewal Underway". A dropdown menu labeled "Contract Actions" is open, showing options such as "Check Out for Internal Edit", "End Contract Early", "Terminate", "Download Full Contract as PDF", "Amend", "Copy", "Add Internal Message", "Start External Communication", and "View/Reactivate Subscribers". A red arrow points from the "Terminate" option in the dropdown to a "Terminate Contract" popup window. The popup window contains the following text:

**Terminate Contract**

Terminating the contract cannot be undone.

The scheduled termination was disabled because the Contract has a Renewal Underway

Is the termination effective  Yes  No immediately?

Why are you terminating this contract? \*

1000 characters remaining

\* Required

Buttons: Terminate Contract, Close



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# 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.

The screenshot displays a procurement system interface. At the top, there are tabs for 'Simple' and 'Advanced' search, with 'Simple' selected. A search bar contains the text 'Cog'. Below the search bar, there are navigation links: 'Go to: Non-Catalog Item | Service Item | Favorites | Forms | Shop | Quick Order | Browse: Vendors | Categories | Contracts'. The search results are displayed in a grid format. On the left side, there is a filter menu with sections: 'By Vendor', 'By Category', 'By Packaging UOM', 'By Result Type', and 'By Manufacturer'. The main grid shows five product listings for ballpoint pens. Each listing includes a product image, a title, a vendor name, a part number, and a price. A green ribbon icon is visible in the top-left corner of the first product listing, indicating a contract is in place. The products listed are:

Product Name	Vendor	Part Number	Price (USD)
COG 1*	Chicago Bulls - Error Testing	0069-2022 - COG1	25.00
COG 5*	Chicago Bulls - Error Testing	0069-2022-COG5	50.00
Cog 1	SOLJAGGAERTEST	0	10.00
Cog 2	SOLJAGGAERTEST	None	20.00
Cog 3	SOLJAGGAERTEST	1	30.00

Below the grid, there are more product listings for 'DR.GRIP COG BALLPT MED ORANGE' and 'ALL ANGLE COG WRENCH'.

# 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.

The screenshot displays a grid of five items for purchase. Each item card includes a placeholder image, a title, a description, a part number, a price, and an 'Add to Cart' button with a dropdown arrow. The 'Cog 2' item's dropdown menu is open, showing three options: 'Add and checkout', 'Add to Draft Cart or Pending PR/PO', and 'Add to PO Revision'. The 'Add to Cart' button for 'Cog 2' is highlighted with a red box.

Item Name	Description	Part Number	Price (USD)	Quantity	Action
COG 1*	from Chicago Bulls - Error Testing	0069-2022 - COG1	25.00	1	Add to Cart
COG 5*	from Chicago Bulls - Error Testing	0069-2022-COG5	50.00	1	Add to Cart
Cog 1	from SOIJAGGAERTEST	0	10.00	1	Add to Cart
Cog 2	from SOIJAGGAERTEST	None	20.00	1	Add to Cart (Dropdown Open)
Cog 3	from SOIJAGGAERTEST	1	30.00	1	Add to Cart
DR.GRIP COG BALLPT MED ORANGE	from Staples	560515	10.00	1	Add to Cart
DR.GRIP COG BALLPT MED CHARC	from Staples	PIL36180	10.00	1	Add to Cart
DR.GRIP COG BALLPT MED BLUE	from Staples	PIL36181	10.00	1	Add to Cart
DR.GRIP COG BALLPT MED ORANGE	from Staples	PIL36183	10.00	1	Add to Cart
ALL ANGLE COG WRENCH	from Graybar Electric Company	88056738	Call For Price		

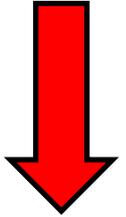
# Purchasing from Contracts

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.

The screenshot displays a web application interface. At the top, there is a navigation bar with a search bar, a cart icon showing '20.00 USD', and notification icons for '19' and '53'. Below the navigation bar, a success message popup is visible, enclosed in a red box. The message reads 'SUCCESS' and '1 item has been added to your cart', with buttons for 'View Cart' and 'Checkout'. Below the success message, the cart view is shown. The cart title is 'My Cart (2023-01-31 laura.shannon@iowa.gov 01)'. The cart contains one item, 'Cog 2', with a quantity of 1 and a price of 20.00 USD. A trashcan icon is circled in red next to the item. The total price of the cart is 20.00 USD. Buttons for 'View My Cart' and 'Checkout' are also present.

# 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**.



Shopping Cart • 3699228

Assign Cart **Proceed To Checkout**

Simple Advanced

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

**1 Item**

**SOJAGGAERTEST • 1 Item • 20.00 USD**

VENDOR DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Cog 2	None	None EA	20.00	1 EA	20.00

ITEM DETAILS

Contract **0113-2023**  
Test Contract 019

Commodity Code 10512

Name  
2023-01-31 laura.shannon@iowa.gov 01

**Total (20.00 USD)**  
Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.  
Total: 20.00



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# 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.

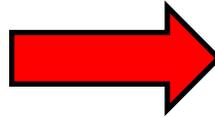
The screenshot displays a software interface for managing purchase requisitions. At the top, there is a navigation bar with a search field (Search (Alt+Q)), a currency indicator (0.00 USD), and user profile information. Below the navigation bar, a blue button labeled "Withdraw Entire Requisition" and a status indicator "1 of 146 Results" are visible. The main content area shows a requisition with a status of "Pending" highlighted in a blue box. Below this, a "Total (20.00 USD)" section is shown, followed by a summary of shipping, handling, and tax charges. A subtotal of 20.00 is listed, with a total of 20.00. A "What's next?" section provides a workflow diagram with the following steps:

- Submitted**: 1/31/2023 3:47 PM, Laura Shannon
- Dept Approval Catch All**: Approved, Laura Shannon
- Create PO**: Active
- Finish**: Future



# 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](mailto:laura.shannon@iowa.gov) 01  
Requisition No.: 3699228  
Priority: Normal  
No. of line items: 1

TOTAL: 20.00 USD

### Details

#### SOJAGGAERTEST

##### 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.

The screenshot shows a purchase order summary page. At the top, a green bar indicates the status is **Completed**. Below this, the total amount is listed as **Total (20.00 USD)**. A note states: "Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals." The subtotal is shown as 20.00, and the total is 20.00. A section titled **Related Documents** contains a hyperlink for **Purchase Order: JAG005FY23-102**. Below this, a **What's next?** section shows a workflow with steps: Submitted (1/31/2023 3:47 PM, Laura Shannon), Dept Approval Catch All (Approved, Laura Shannon), Create PO (Completed), and Completed (1/31/2023 3:47 PM). Red boxes highlight the 'Completed' status bar and the 'Purchase Order' hyperlink.

# Purchase Orders

The Status of the Purchase Order is displayed.

Purchase Order • [SOJAGGAERTEST](#) • JAG005FY23-102 Revision 0

[Status](#) [Summary](#) [Revisions](#) **1** [Confirmations](#) [Shipments](#) [Change Requests](#) [Invoices](#) [Comments](#) [Attachments](#) [History](#)

## General Information

PO/Reference No. **JAG005FY23-102**

Revision No. **0**

Vendor Name [SOJAGGAERTEST](#)

Purchase Order Date **1/31/2023**

Total **20.00**

Owner Name **Laura Shannon**

Owner Phone **+1 515-330-7325**

Owner Email **[laura.shannon@iowa.gov](mailto:laura.shannon@iowa.gov)**

Requisition Number **[3699228](#)** [view](#) | [print](#)

## Document Status

A/P status **Open**

Workflow **✓ Completed**  
(1/31/2023 3:48 PM)

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: [view](#)

Manual

Distribution Date/Time **1/31/2023 3:48 PM**

Vendor **Sent To Vendor**

## Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 ✓	<a href="#">Cog 2</a>	None	None EA	20.00	1 EA	20.00

[^ DETAILS](#)

Vendor **Invoicing**

[Sent To Vendor](#) [none](#)

**Completed**

**Details**

Vendor Status

Sent To Vendor

Vendor

SOJAGGAERTEST

**Total (20.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal **20.00**

**20.00**

**Related Documents**

[Requisition: 3699228](#)

**What's next?**

Workflow Status **• Completed**

Workflow [📄](#) [🖨️](#)

Show skipped steps

**Submitted**  
1/31/2023 3:47 PM  
Laura Shannon

[Create Vendor Documents](#)



# 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.

**Document Status** ▼

A/P status **Open**

Workflow **✓ Completed**  
(1/31/2023 3:48 PM)

The system distributed the purchase order using the method(s) indicated below the last time it was distributed; [view](#)

Manual	
Distribution Date/Time	1/31/2023 3:48 PM
Vendor	Sent To Vendor

---

Size/Packaging	Unit Price	Quantity	Ext. Price
None EA	20.00	1 EA	20.00

**Completed**

**Details** ▼

Vendor Status

Sent To Vendor

Vendor  
SOIJAGGAERTEST

**Total (20.00 USD)** ▼

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	20.00
	<b>20.00</b>

**Related Documents** ▼

[Requisition: 3699228](#)

**What's next?** ▼

Workflow Status ● Completed





**Department of  
Administrative Services**

*Empowering People  
Collaboration  
Customer Service*

# Invoicing

How to pay the Vendor Invoice

# 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](mailto:laura.shannon@iowa.gov)

515-330-7325

