Department of Administrative Services

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IMPACS(Jaggaer)RFP

Step-by-Step Guide for Request for Proposal Creation

Table of Contents

This document is for Step-by-Step RFP Creation in IMPACS – see RFP Evaluation document for an IMPACS Step-by-Step Guide (coming soon)

RFP Rules

When the price is not the sole consideration for awarding a procurement contract, the Agency uses a Request for Proposal process. In this process, the award goes to the respondent whose proposal is determined to be most advantageous to the state in accordance with technical and price criteria set forth in the RFP.

See the DAS Central Procurement Policy and Procedures Manual for more details.

The RFP may require additional approvals from OCIO or IDOM in accordance with its policies.

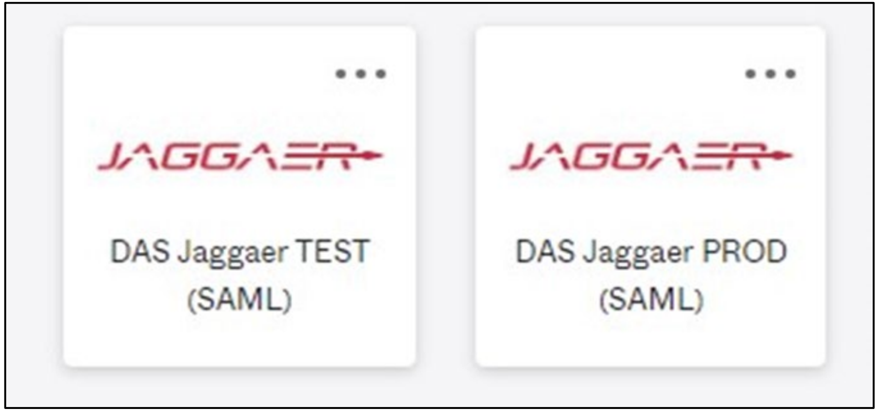
The competitive sealed RFP process includes the following steps:

1. Creating the Request for Proposal (RFP)
2. Posting the RFP on IMPACS and Bid Opportunities
3. Receiving and Opening the Proposals
4. Evaluating and Scoring the Proposals
5. Awarding the Contract
6. Negotiating the Contract
7. Generating the Contract

TSB Notification IAC 117.7(2)

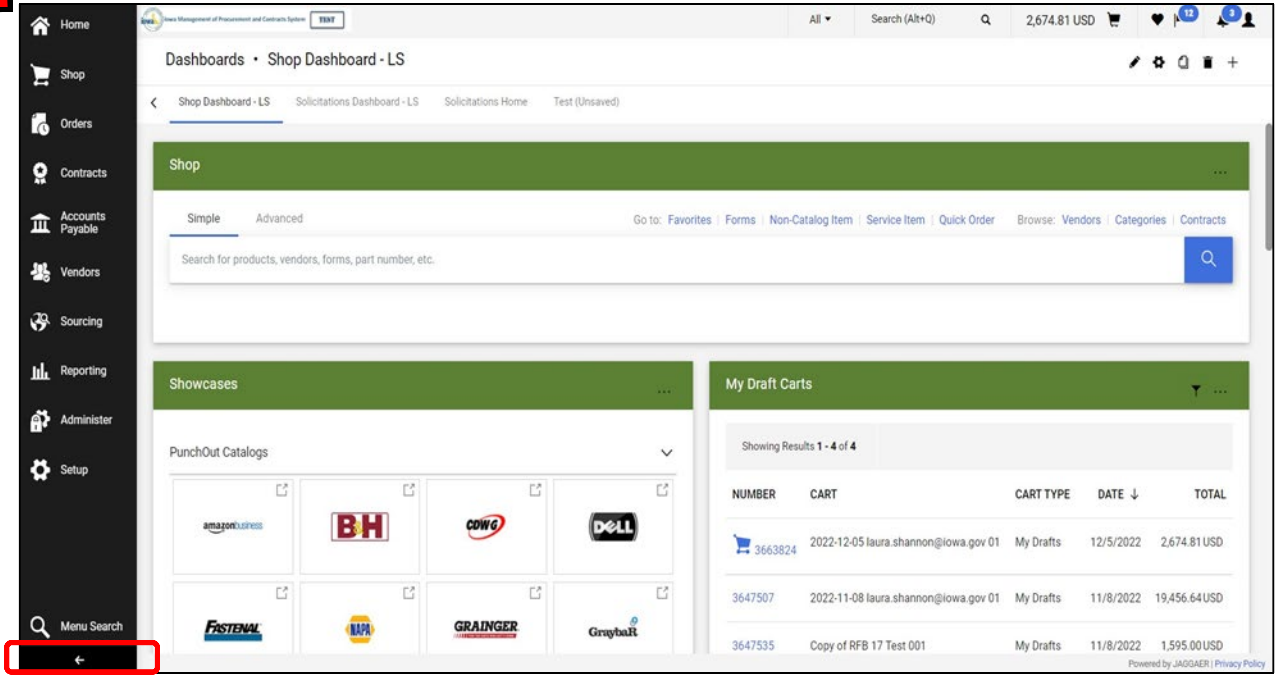
Post all solicitations to the TSB web page at least 48 hours prior to a general posting in IMPACS. The password to the TSB web page changes monthly; each agency shall assign an employee current access to the web page.

Sign into Okta and locate the Jaggaer stickers



Best practice: Create an RFP in the IMPACS (Jaggaer) test environment before posting in the Production (PROD) live site.

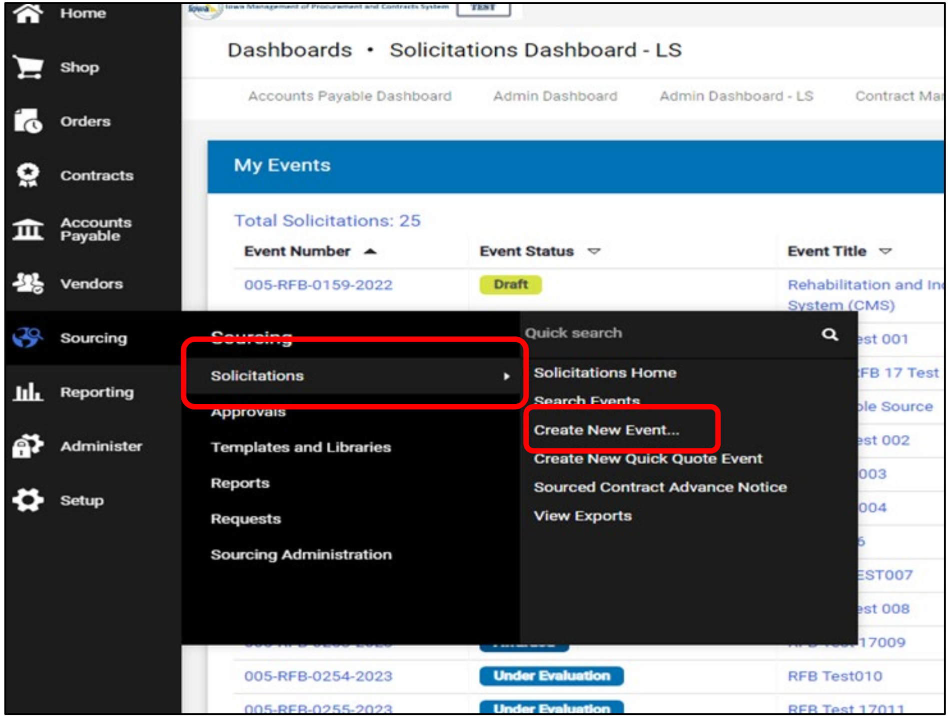
Left Menu Descriptions



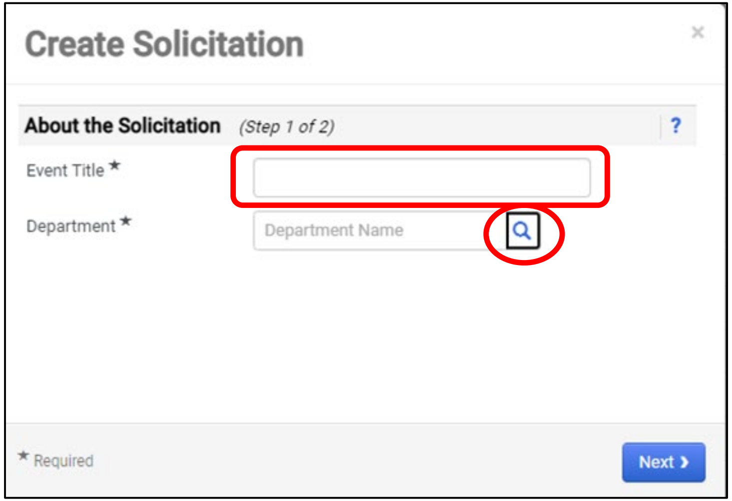
Expand to see icon labels by clicking on the small arrow at the bottom.

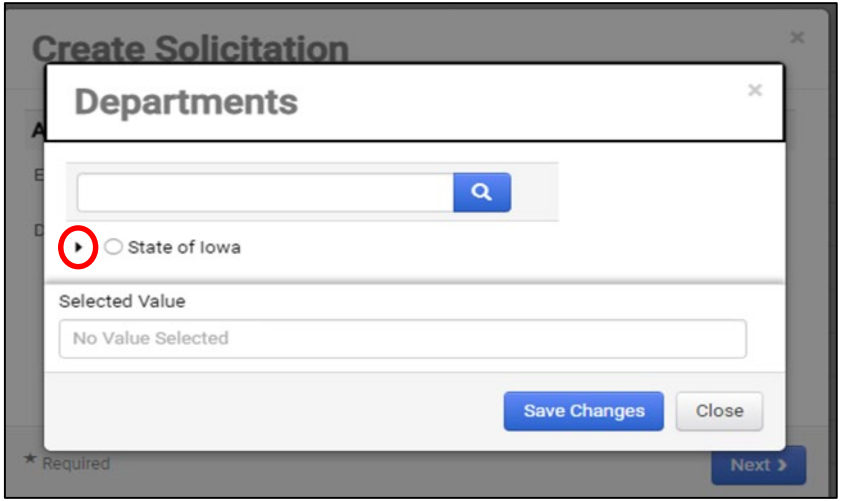
Create New Event

Open the **Sourcing Menu**. Select the **Solicitations** Sub-menu and **Create New Event**.



Create Solicitation





1. Enter the **Title** of the RFP.

2. Type in your **Department** (Agency) or search for your department by clicking on the **Search** icon (magnifying glass).

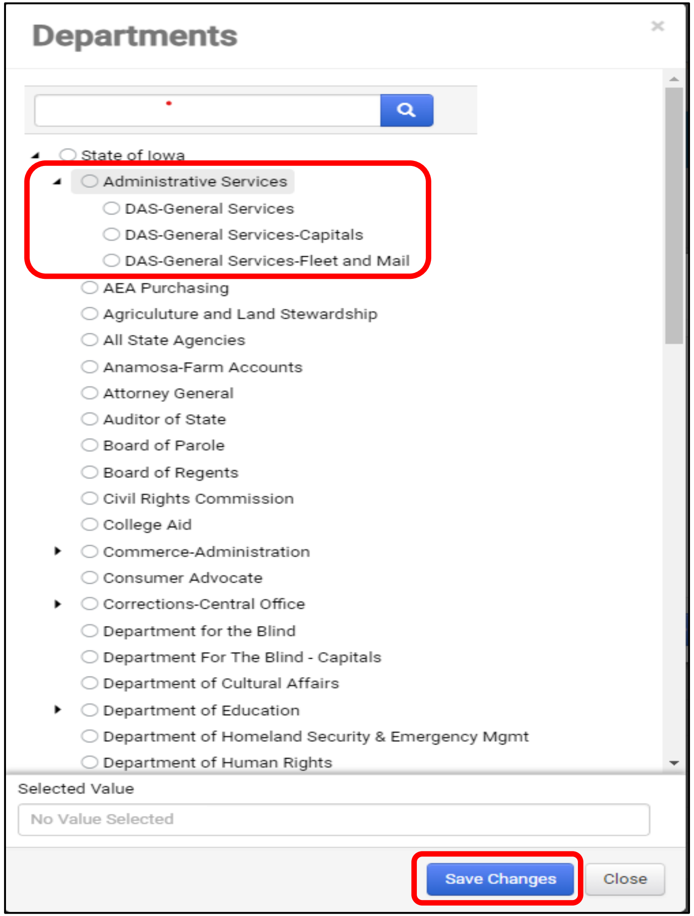
3. Expand the small arrow to see a drop-down menu of all State of Iowa Departments.

Adding Department (Agency)

Please note that there are sub-menus for parent Agencies.

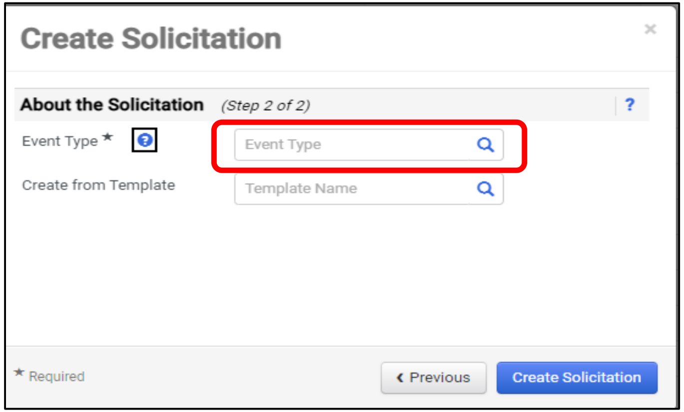
Click on the radio button next to the Department associated with the RFB.

After you have selected your department, click **Save Changes** at the bottom of the Department search page.

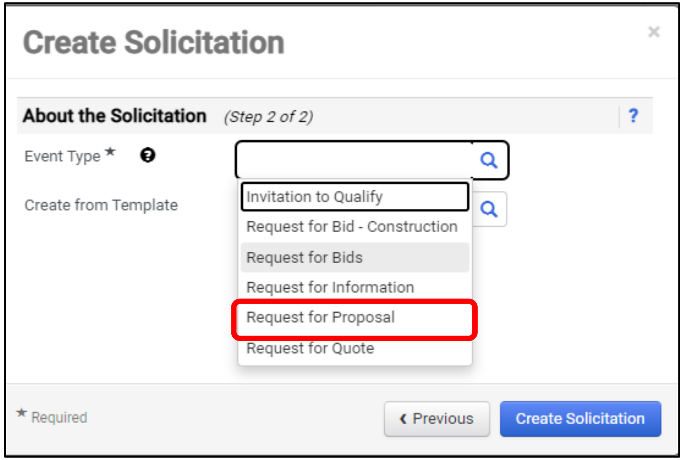


About the Solicitation

Click the **Search** icon (magnifying glass) to select the type of solicitation being created.

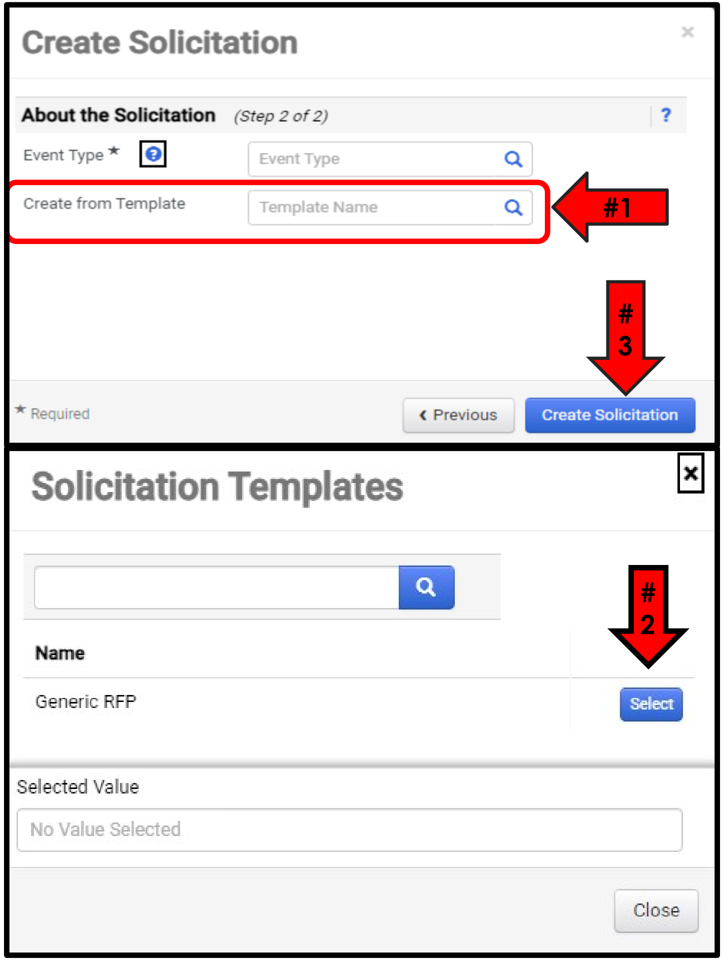


Select **Request for Proposal**



Create from Template

1. Click on the **Search** icon to select from the RFP templates available.
2. Select **Generic RFP.** Click **Select** to load the **Template.**
3. Click on **Create Solicitation.**



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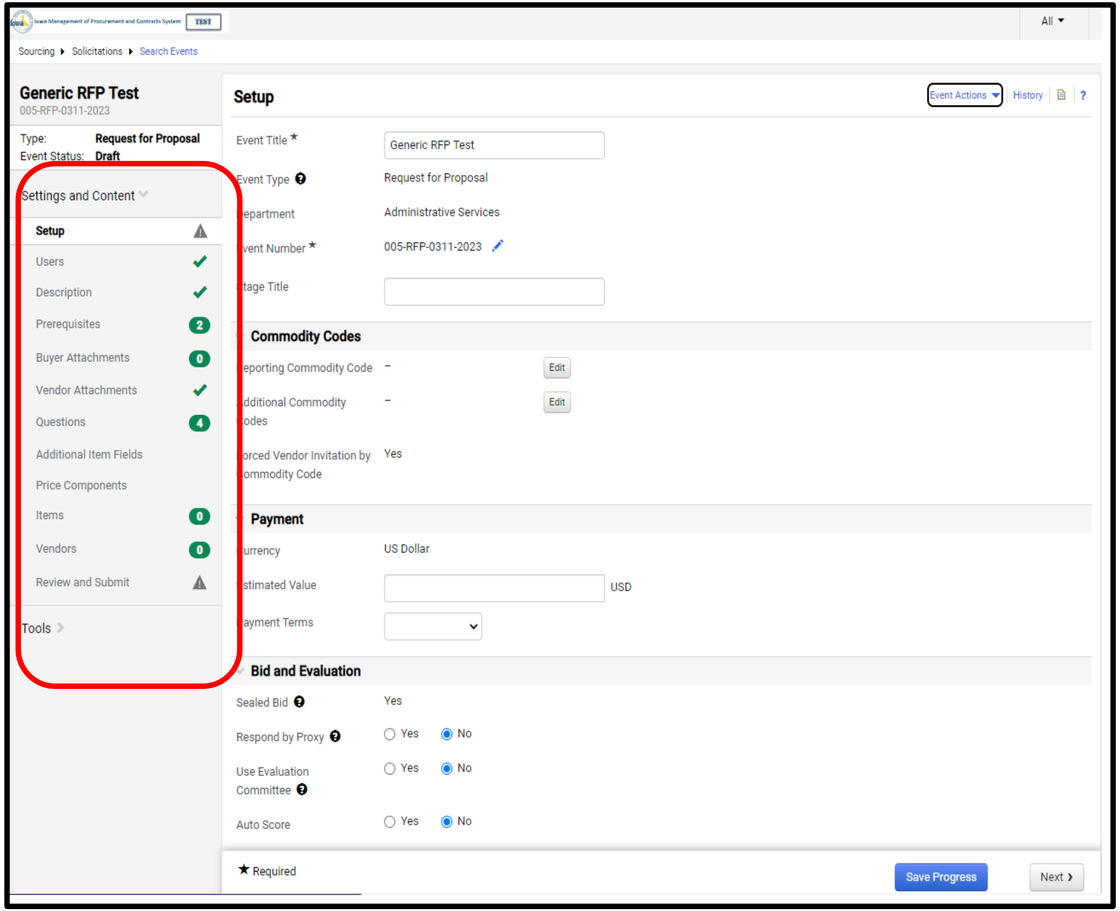
Setup Wizard

Settings and Content

Following the wizard on the left-hand side of the screen, IMPACS will walk the Issuing Officer (Buyer) through setting up the RFP.



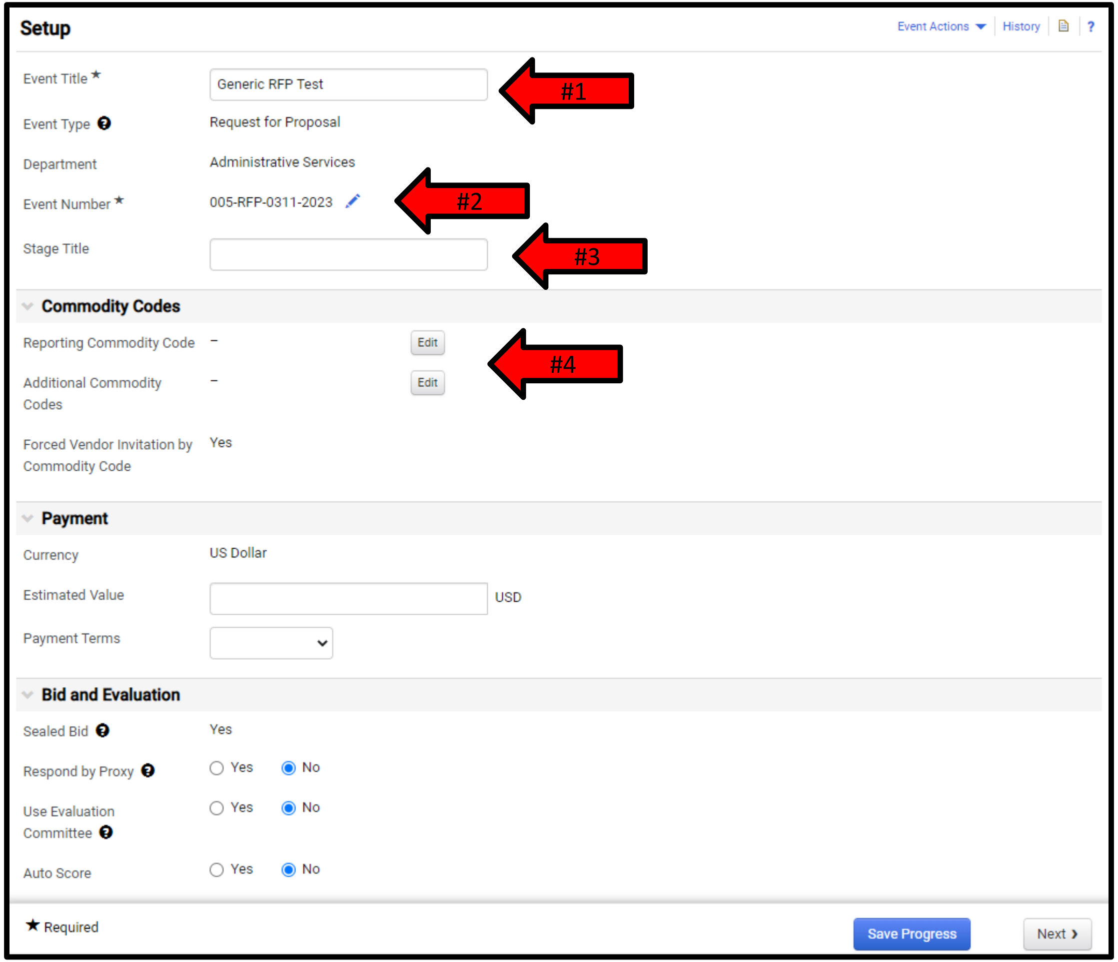
Setup

1. The Buyer may change the Title of the RFP. (Optional)

2. (Optional) change the RFP number by clicking on the pencil icon. (IMPACS auto-generates a number by default).

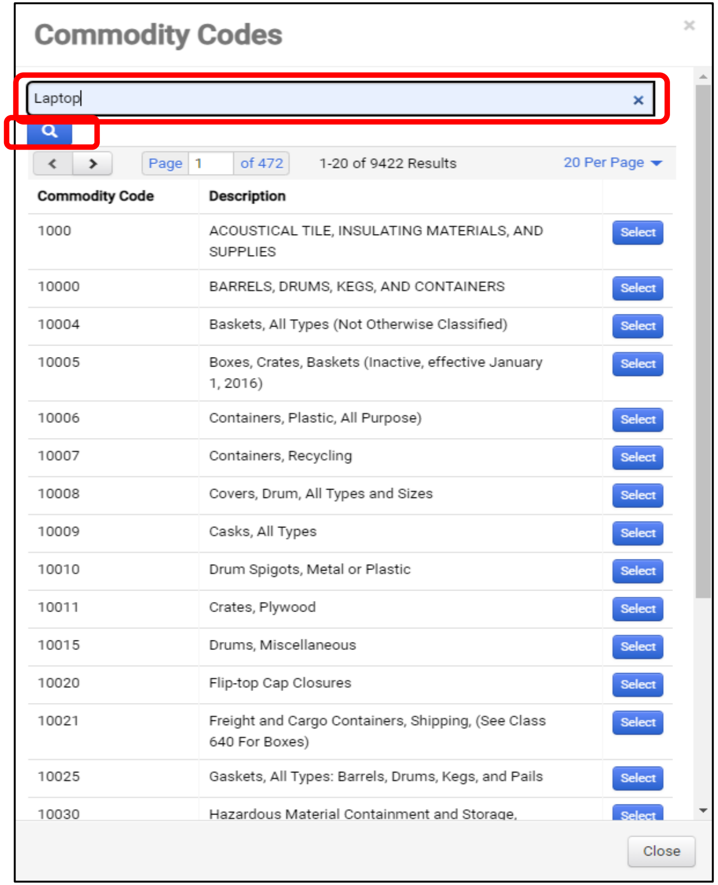
3. Ignore **Stage Title.**

4. By clicking on the **Edit** button next to the **Reporting Commodity Code** and **Additional Commodity Codes,** the Buyer may select the appropriate Commodity Codes for the RFP.



Setup – Commodity Codes

If the Buyer does not know the Commodity Code from memory, then use the search box at the top of the Commodity Codes Menu that pops up when the **Edit** button is selected.

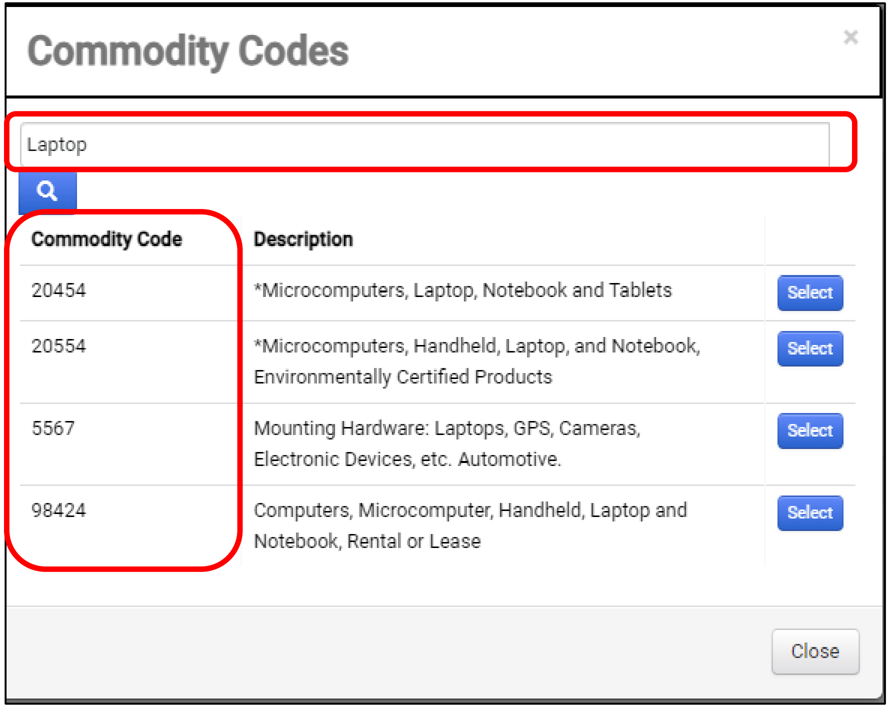


Setup – Commodity Codes

These are the Commodity Codes that come up when “Laptop” is entered in the search box.

Select the Commodity Code that best fits your RFP.

If additional Commodity Codes are needed for the RFP, then repeat the process for the **Additional Commodity Code** field on the **Setup page**.



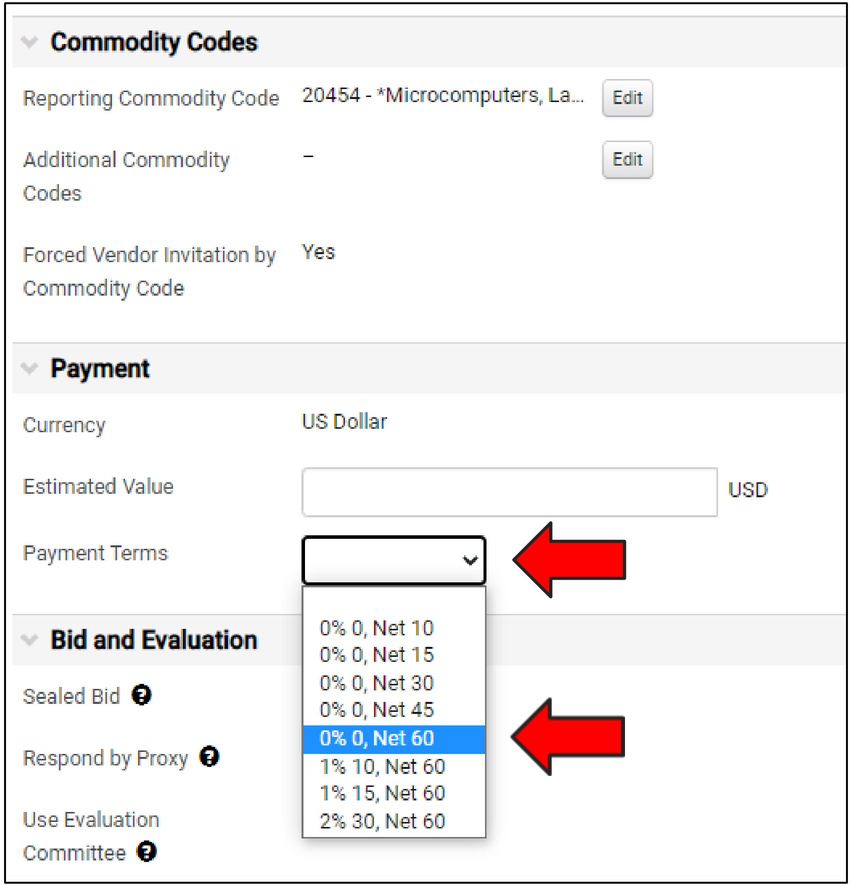
Setup – Commodity Codes & Payment

1. If the Buyer wants the Vendor(s) (Respondents) to be notified of this solicitation then leave the **Forced Vendor Invitation by Commodity Code** field to the default value of **Yes**.

2. Default **Currency** is **US Dollar**.

3. Please estimate the value of the RFP.

Setup -Payment



Enter the Payment Terms from the drop-down menu. **Net 60** is standard by the State of Iowa Code.

Setup - Bid and Evaluation & Display and Communication

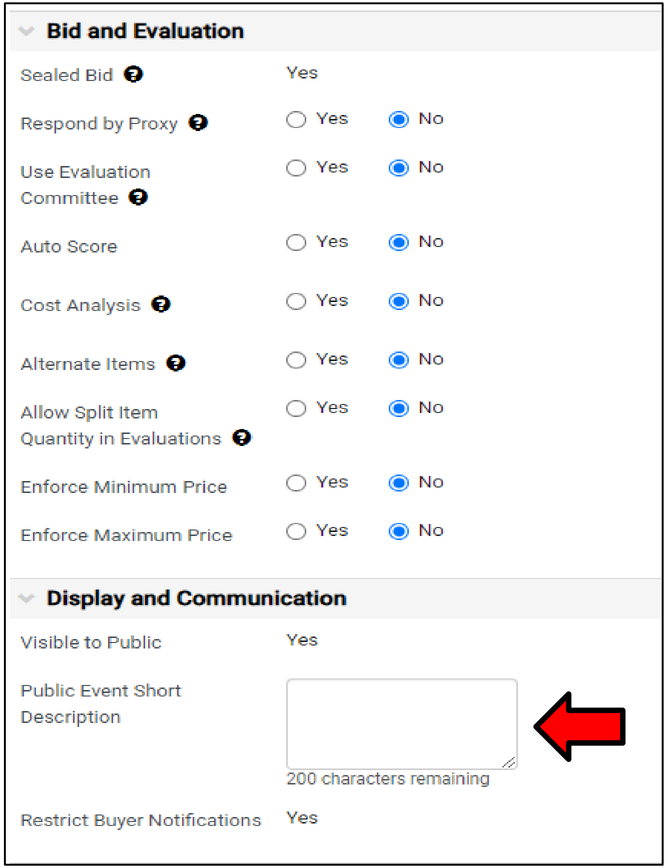
Use the **"?"** icon to view a **Help Menu** that describes the function of the **Bid and Evaluation** radio buttons.

At this time, Buyers are attaching a full RFP document, and not using the Evaluation functionality of IMPACS (Jaggaer).

Testing is underway for RFP Evaluations and a guide will be available soon. You will not select any of the radio buttons in this section.

Respondents will submit a technical and cost proposal in IMPACS and not submit pricing in the **Items** section.

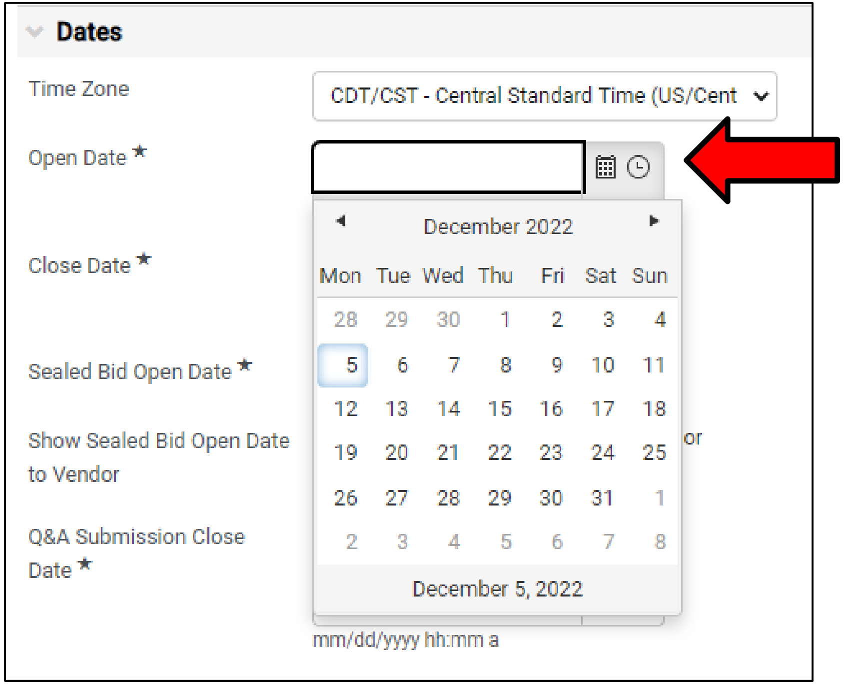
Include a brief description of the Goods and/or Services you seek in the **Public Event Short Description** Section.



Setup - Dates

Select the date the RFP will be open to the public. Please make sure it is at least 48 hours after posting the RFP on the TSB site (Bid Opportunities).

Type in the date directly in the box or use the pop-up calendar.



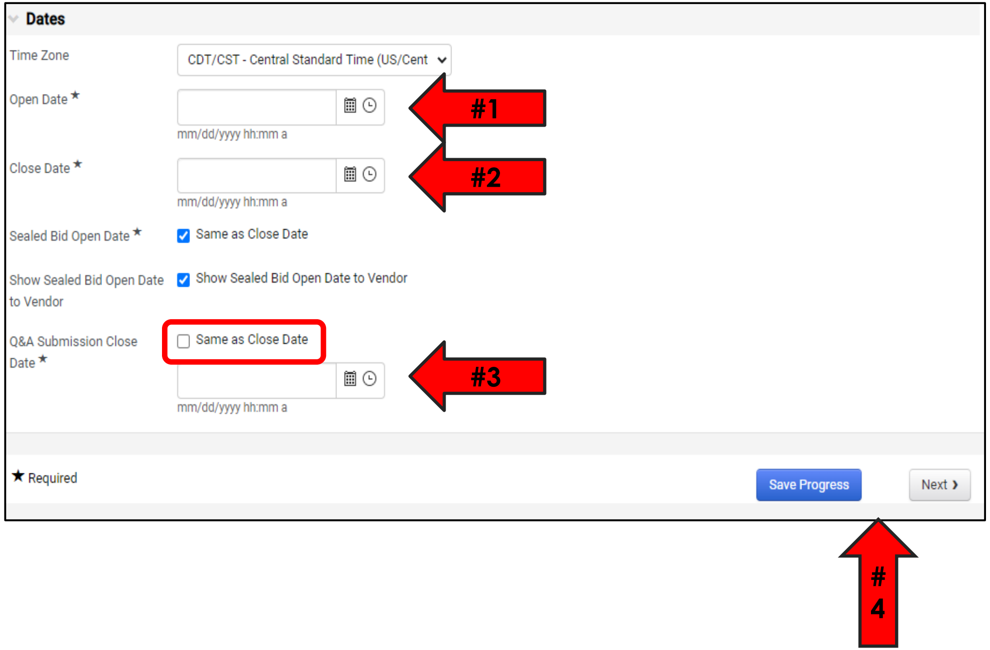
Setup – Dates & Next Section in the Wizard

1. Continue filling out the close date.

2. **Sealed Bid Open Date** and **Show Sealed Bid Open Date** to Vendor are checked by default.

3. **Question & Answer Submission Close Date** may be entered the same way as the **Open and Close dates. Note:** the check box for making the date the same as the close date. Typically Q&A close date is earlier than the close date to give the Issuing Officer time to answer the questions.

4. **Save Progress** to save and stay on the page, or **Next** to save and move to the next Section.



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Buyers

Add & Edit Buyers

Buyers

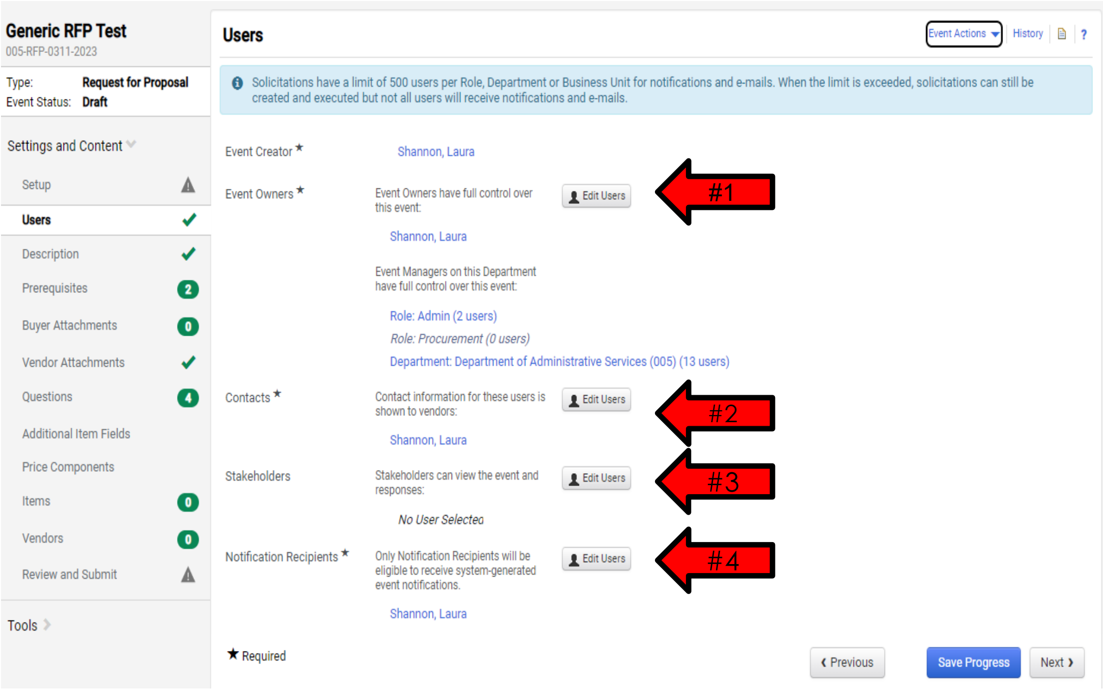
The Buyer may add Buyers for access to the RFP.

1. **Event Owners** may be individual **Buyers** or **Buyers** with various **Roles** (typically the Department Approvers for your Agency. You may add additional **Buyers** here.

2. **Contacts** for the RFP may be added here. They must be an IMPACS Buyer.

3. **Stakeholders** are **Buyers** who are interested in the solicitation but can only view it, not edit or respond to questions.

4. **Notification Recipients** will receive IMPACS notifications. For instance, if a Vendor has submitted a question.



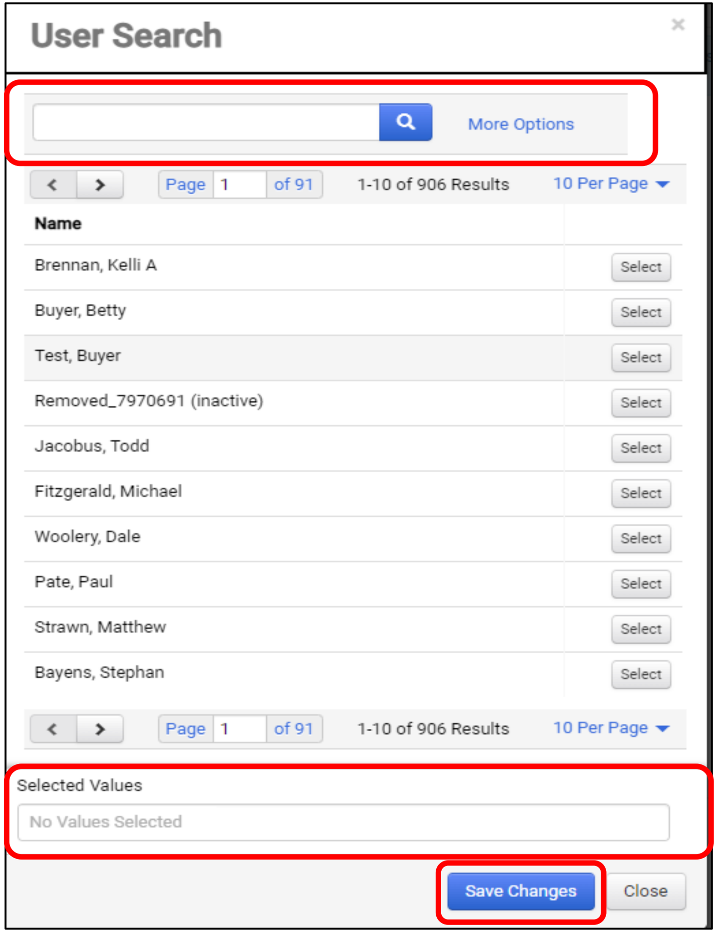
Buyers – Buyer Search

Once the **Edit Buyers** button is selected, a **Buyer Search** pop-up will appear. Search for the **Buyer** in the **Search Box** and then click Select once the Buyer has been found.

The **Event Creator** and the additional **Buyer** will show in the Selected Values box.

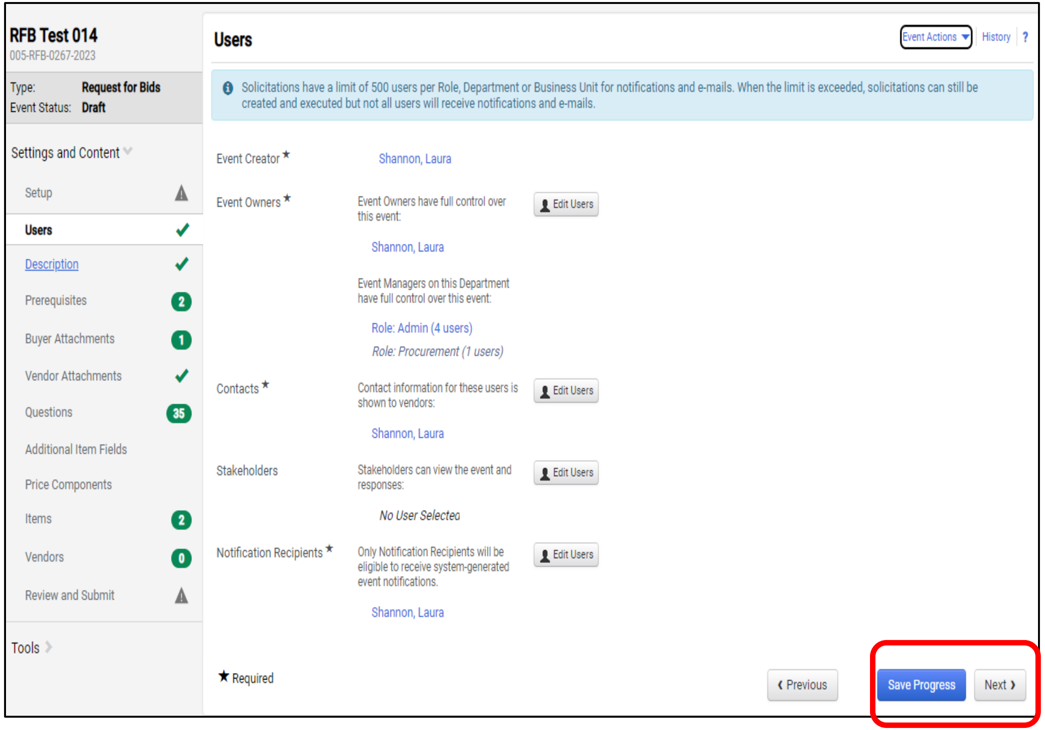
You may delete the selections by clicking the **Remove** button next to the name.

Save Changes once the Buyer(s) have been selected.



Buyers - continued

Save Progress to save and stay on the page, or **Next** to save and move to the next section.



Description

Description

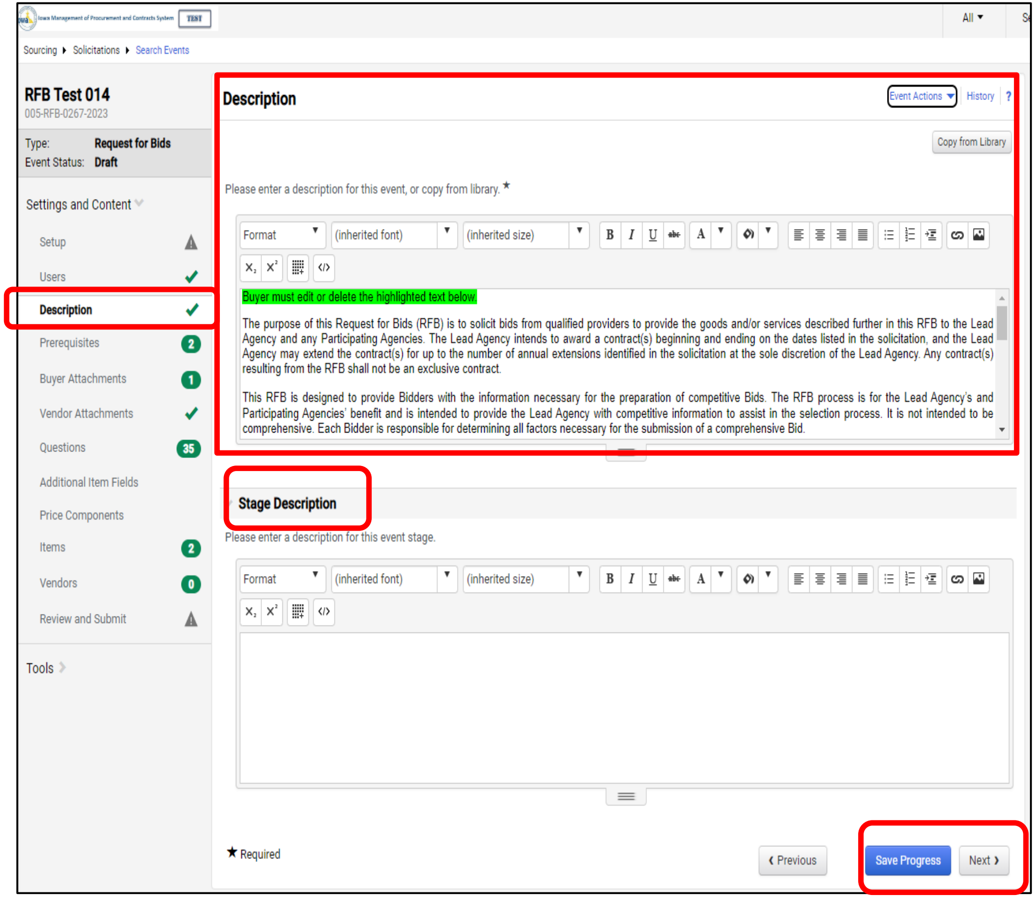
The **Description** Field is filled out with general information.

The Buyer may create their own description or add to the existing language.

If using the existing language, please address the areas highlighted in green.

Add or delete the language as necessary. The formatting controls are similar to Microsoft Word and the Buyer may remove the highlighter as necessary.

Ignore the **Stage Description** – it is not used.

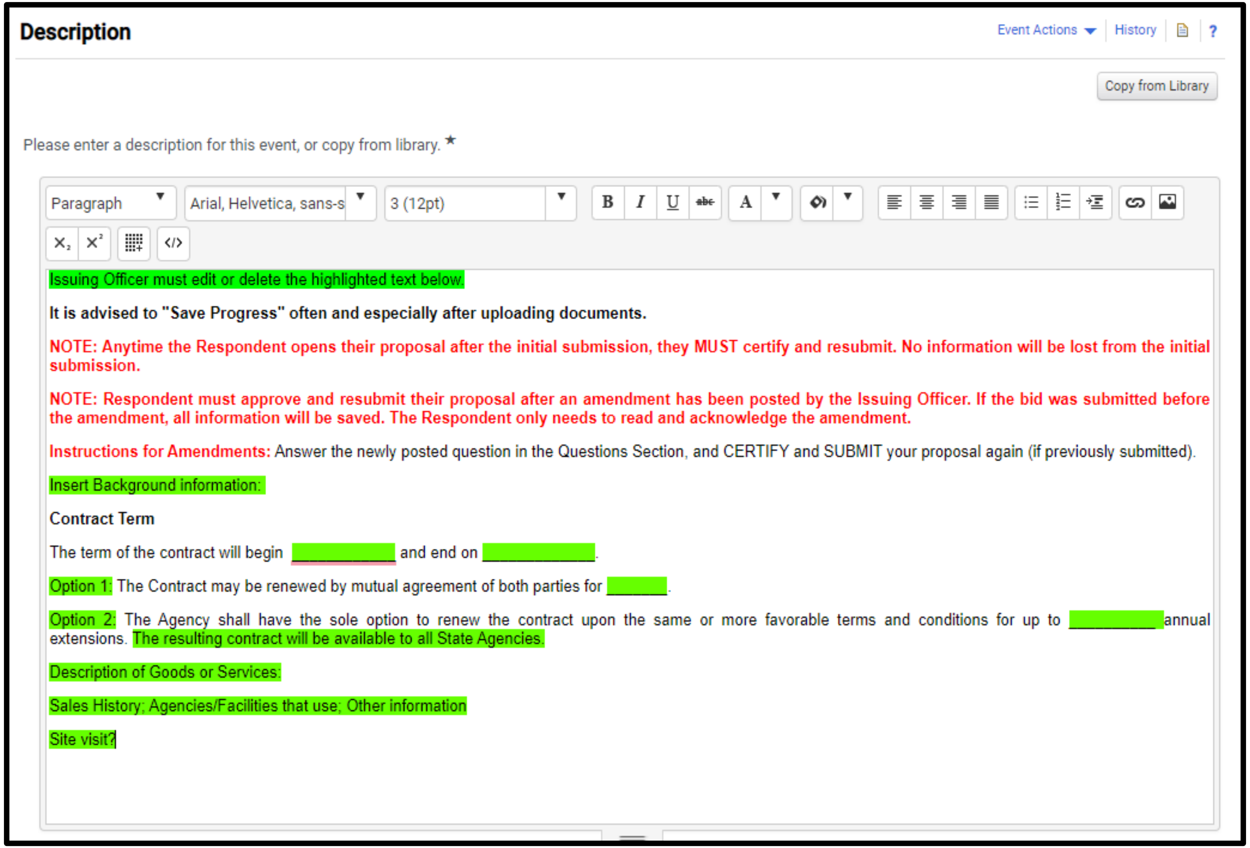


Description

Here is what the full pre-loaded **Description** looks like. The Buyer shall modify the description language. It is advised the leave the two “NOTE” sections in the description.

Skip the Stage Description.

Once the changes have been made, **Save Progress**, or click **Next** to move to the next Section.



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Prerequisites

Add, Edit & Delete

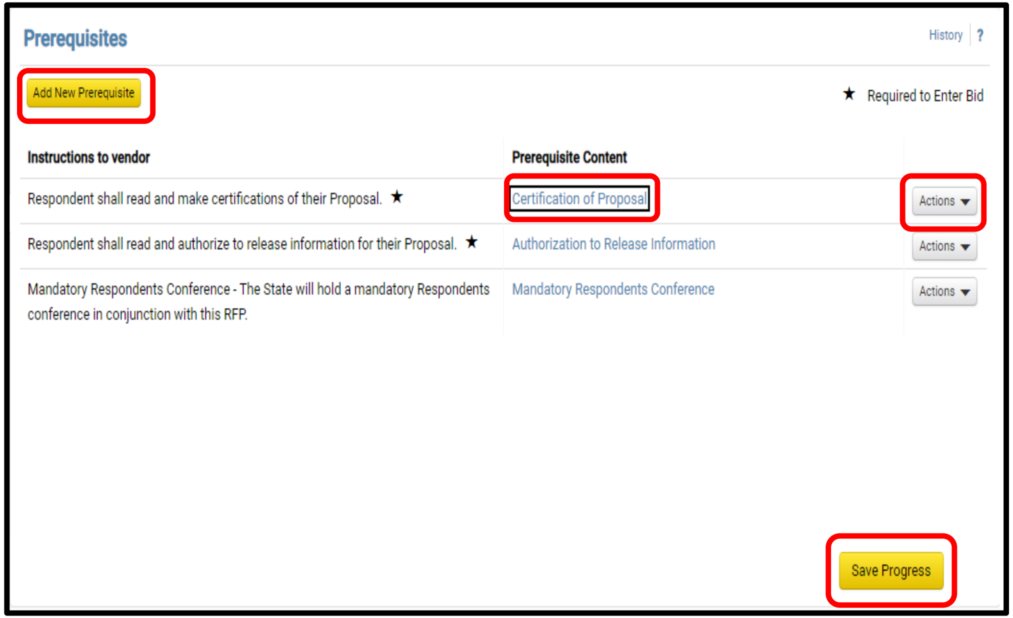
Prerequisites

Prerequisites contain language that the Respondent **MUST** agree to.

There are preloaded **Prerequisites** that may be included depending on what is in the RFP document already.

1. The Respondent will see a pop-up of the language when they click on the hyperlink. (See next page).

2. Using the **Add New Prerequisite** button, the Buyer may add Prerequisites from the Library or create your own. Using the **Actions** button the Buyer may also edit or delete the Prerequisites.



Prerequisites - Continued

Clicking on the link for **Certification of Proposal**, a popup window appears with the language the Respondent must agree to in order to submit a proposal.

Prerequisite Content

Clos

Certification of Independence

I certify that I am a representative of Respondent expressly authorized to make the following certifications on behalf of Respondent. By submitting a Proposal in response to the RFP, I certify on behalf of the Respondent the following:

1. The Proposal has been developed independently, without consultation, communication or agreement with any employee or consultant to the Agency or with any person serving as a member of the evaluation committee.
2. The Proposal has been developed independently, without consultation, communication or agreement with any other Respondent or parties for the purpose of restricting competition.
3. Unless otherwise required by law, the information found in the Proposal has not been and will not be knowingly disclosed, directly or indirectly prior to the Agency's issuance of the Notice of Intent to Award the contract.
4. No attempt has been made or will be made by Respondent to induce any other Respondent to submit or not to submit a Proposal for the purpose of restricting competition.
5. No relationship exists or will exist during the contract period between Respondent and the Agency or any other State agency that interferes with fair competition or constitutes a conflict of interest.

Certification Regarding Debarment

I certify that, to the best of my knowledge, neither Respondent nor any of its principals: (a) are presently or have been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal Agency or State Agency; (b) have within a five year period preceding this Proposal been convicted of, or had a civil judgment rendered against them for commission of fraud, a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of antitrust statutes; commission of embezzlement, theft, forgery, falsification or destruction of records, making false statements, or receiving stolen property; (c) are presently indicted for or criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in (b) of this certification; and (d) have not within a three year period preceding this Proposal had one or more public transactions (federal, state, or local) terminated for cause.

This certification is a material representation of fact upon which the Agency has relied upon when this transaction was entered into. If it is later determined that Respondent knowingly rendered an erroneous certification, in addition to other remedies available, the Agency may pursue available remedies including suspension, debarment, or termination of the contract.

Certification Regarding Registration, Collection, and Remission of Sales and Use Tax

Pursuant to *Iowa Code sections 423.2(10) and 423.5(8) (2016)* a retailer in Iowa or a retailer maintaining a business in Iowa that enters into a contract with a state agency must register, collect, and remit Iowa sales tax and Iowa use tax levied under *Iowa Code chapter 423* on all sales of tangible personal property and enumerated services. The Act also requires Respondents to certify their compliance with sales tax registration, collection, and remission requirements and provides potential consequences if the certification is false or fraudulent.

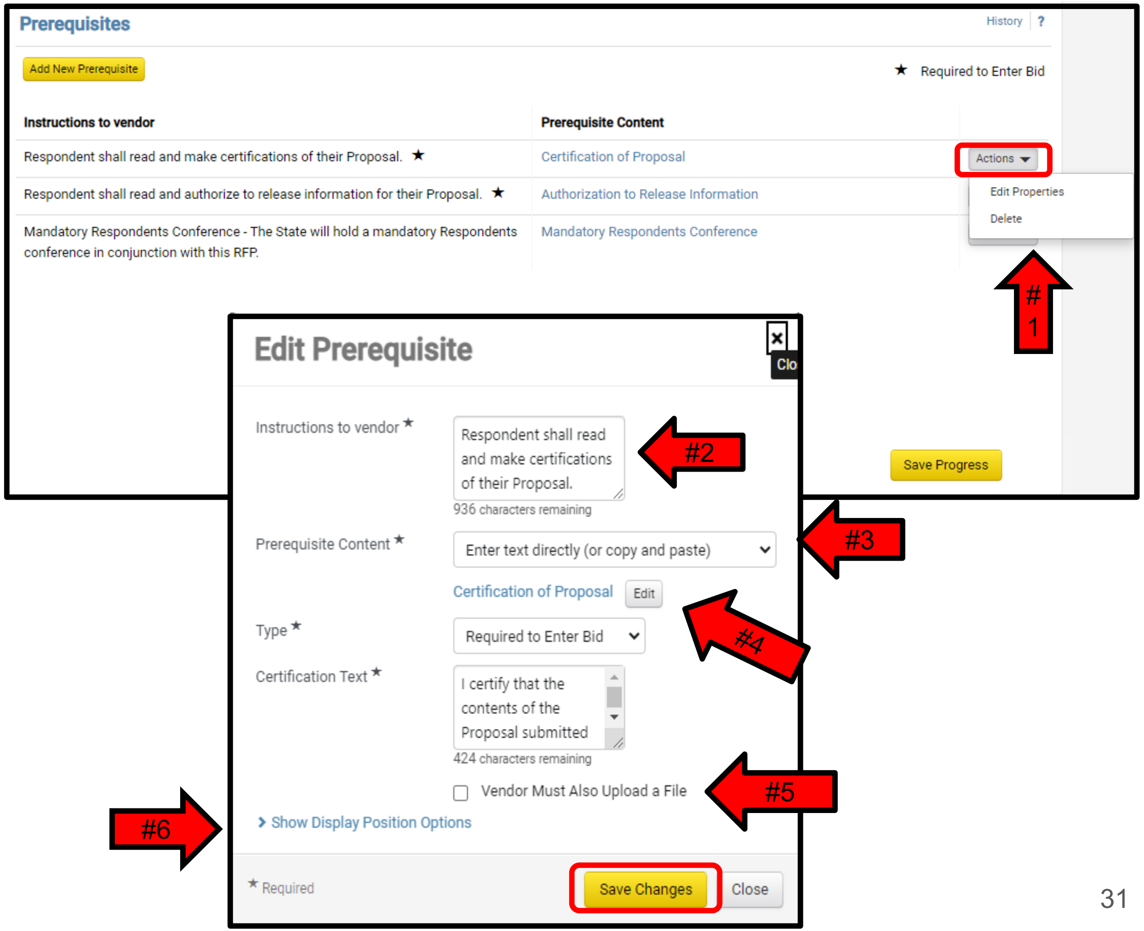
By submitting a Proposal in response to the (RFP), the Respondent certifies one of the following:

- Respondent is registered with the Iowa Department of Revenue, collects, and remits Iowa sales and use taxes as required by *Iowa Code chapter 423*; or

Close

Prerequisites - Edit

1. The Buyer may edit the Prerequisite or delete it.
2. The Buyer may change the instructions to the Respondent (Vendor).
3. The Buyer may change the Prerequisite Content. Enter text or upload a file.
4. The Buyer may change the Certification text.
5. The Buyer may require the Respondent (Vendor) to upload a file.
6. The Buyer may change the order of the Prerequisite language to First, Last, or anywhere in between (if there are more than two Prerequisites).
7. **Save Changes**



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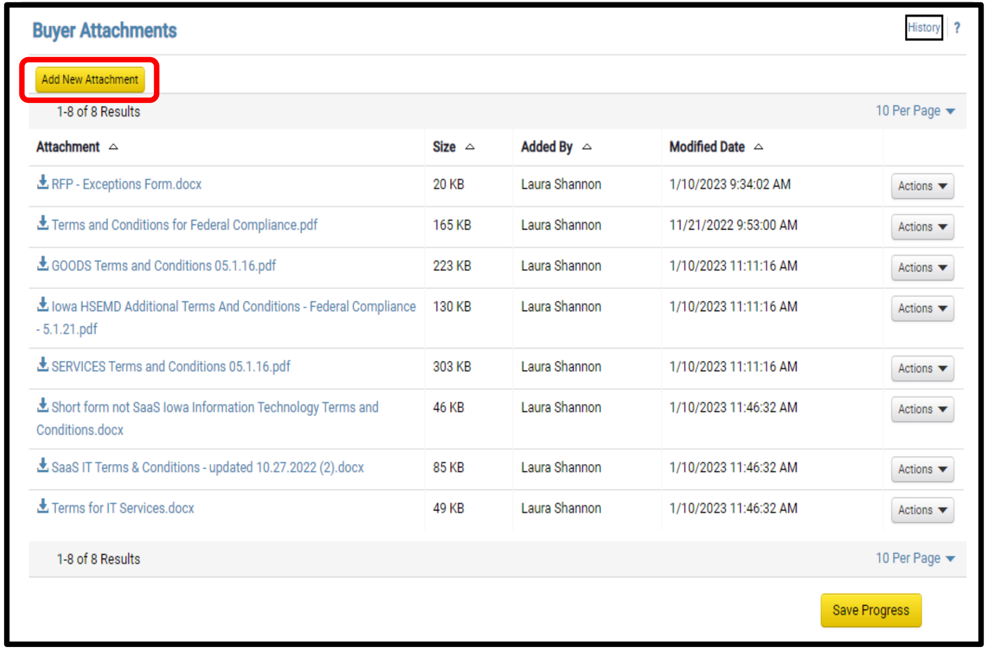
Buyer Attachments

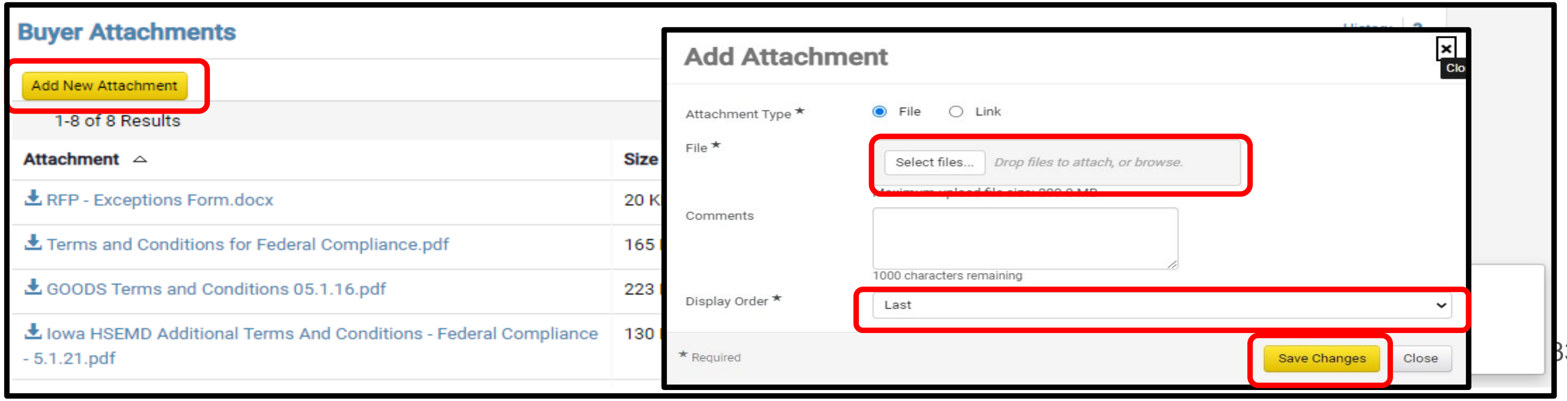
Location for Purchasing Agent/Issuing Officer Attachments to the Respondents. Attach RFP Document here

Buyer Attachments

This is where the Buyer will upload the RFP document.

Click on the **Add New Attachment** button to add the RFP Document (.pdf is advised) and any other relevant file. Click the **Select files** button and upload the document(s). Make the RFP document FIRST, by changing the **Display Order**.





Buyer Attachments

An **Exceptions Form** is preloaded on the **Buyer Attachments** Page. The Buyer may load other attachments in addition to the RFP here for the Respondent to download by selecting **Add Attachment**. The Buyer may edit or upload a different version of the **Exceptions Form**.

Delete the Terms and Conditions (T&C) that are not needed for the RFP. If the T&Cs are incorporated in the RFP document, delete all the extra T&Cs.

Buyer Attachments

History | ?

Add New Attachment

1-8 of 8 Results — 10 Per Page

Attachment	Size	Added By	Modified Date	
RFP - Exceptions Form.docx	20 KB	Laura Shannon	1/10/2023 9:34:02 AM	Actions
Terms and Conditions for Federal Compliance.pdf	165 KB	Laura Shannon	11/21/2022 9:53:00 AM	Actions
GOODS Terms and Conditions 05.1.16.pdf	223 KB	Laura Shannon	1/10/2023 11:11:16 AM	Actions
Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	130 KB	Laura Shannon	1/10/2023 11:11:16 AM	Actions
SERVICES Terms and Conditions 05.1.16.pdf	303 KB	Laura Shannon	1/10/2023 11:11:16 AM	Actions
Short form not SaaS Iowa Information Technology Terms and Conditions.docx	46 KB	Laura Shannon	1/10/2023 11:46:32 AM	Actions
SaaS IT Terms & Conditions - updated 10.27.2022 (2).docx	85 KB	Laura Shannon	1/10/2023 11:46:32 AM	Actions
Terms for IT Services.docx	49 KB	Laura Shannon	1/10/2023 11:46:32 AM	Actions

1-8 of 8 Results — 10 Per Page

Save Progress

Buyer Attachments

Event Actions | History | ?

Add Attachment

1-8 of 8 Results — 10 Per Page

Attachment	Version	Size	Added By	Modified Date	
RFP - Exceptions Form.docx	1	20 KB	Laura Shannon	3/24/2023 2:11:30 PM	Actions
Terms and Conditions for Federal Compliance.pdf	1	165 KB	Laura Shannon	3/24/2023 2:11:30 PM	Actions
GOODS Terms and Conditions 05.1.16.pdf	1	223 KB	Laura Shannon	3/24/2023 2:11:30 PM	
Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	1	130 KB	Laura Shannon	3/24/2023 2:11:30 PM	
SERVICES Terms and Conditions 05.1.16.pdf	1	303 KB	Laura Shannon	3/24/2023 2:11:31 PM	

Actions menu:
- Edit Properties
- Download
- Upload New Version
- Delete

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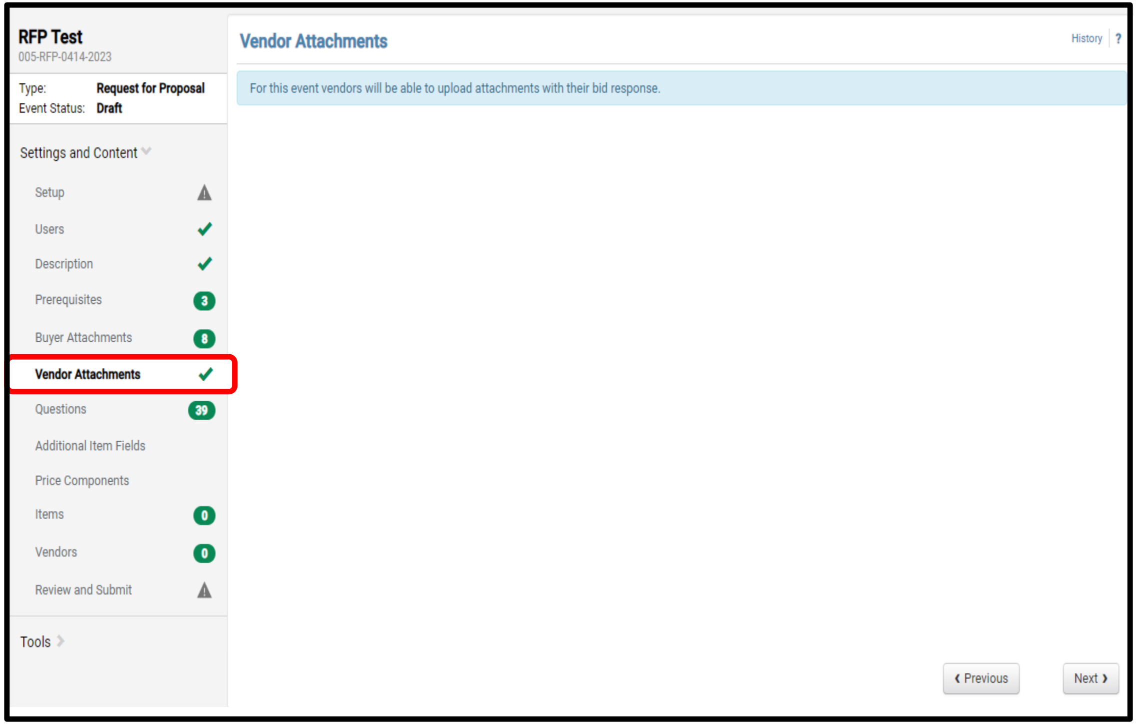
Vendor Attachments

Location for Respondent Attachments – part of the total Bid

Vendor Attachments

Vendor Attachments are where the Buyer will find any of the attachments you asked the Respondent (Vendor) to provide.



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Questions Section

Overview

Questions Section

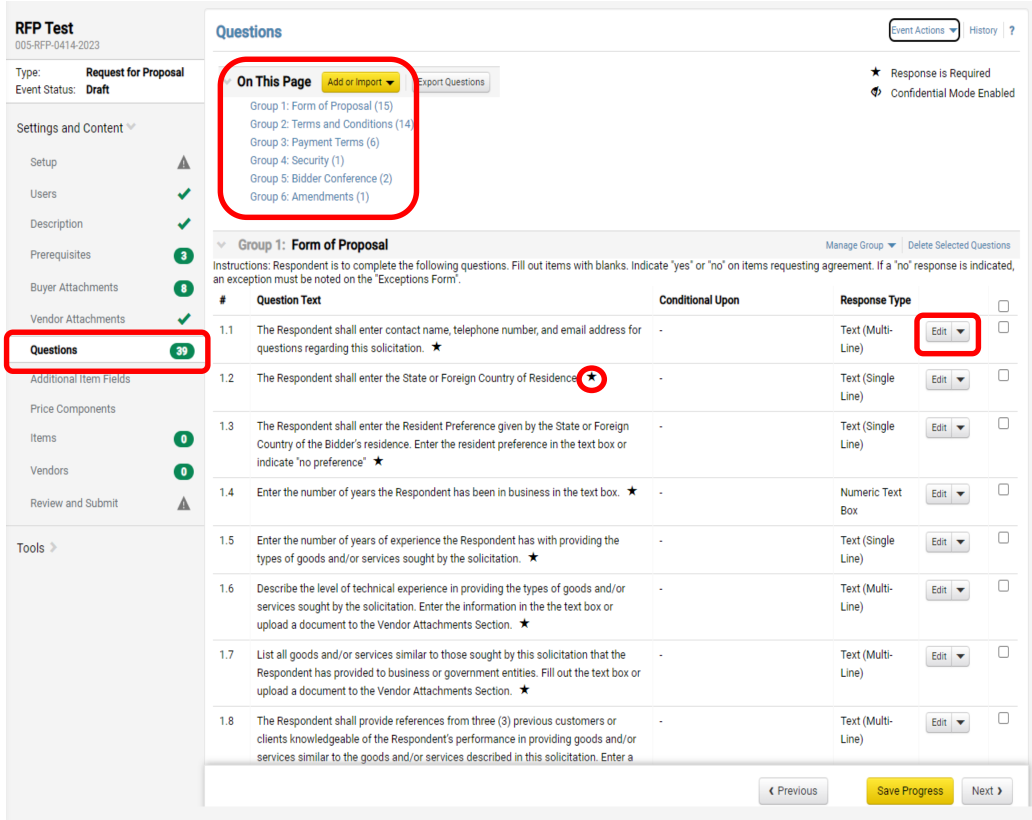
The **Questions Section** asks the Respondent to provide information or respond to the Terms and Conditions.

The **Questions Section** is divided into **Groups** which may be edited, deleted or reordered.

Questions with a ★ means the Respondent must respond.

Templates will be populated with the most common questions.

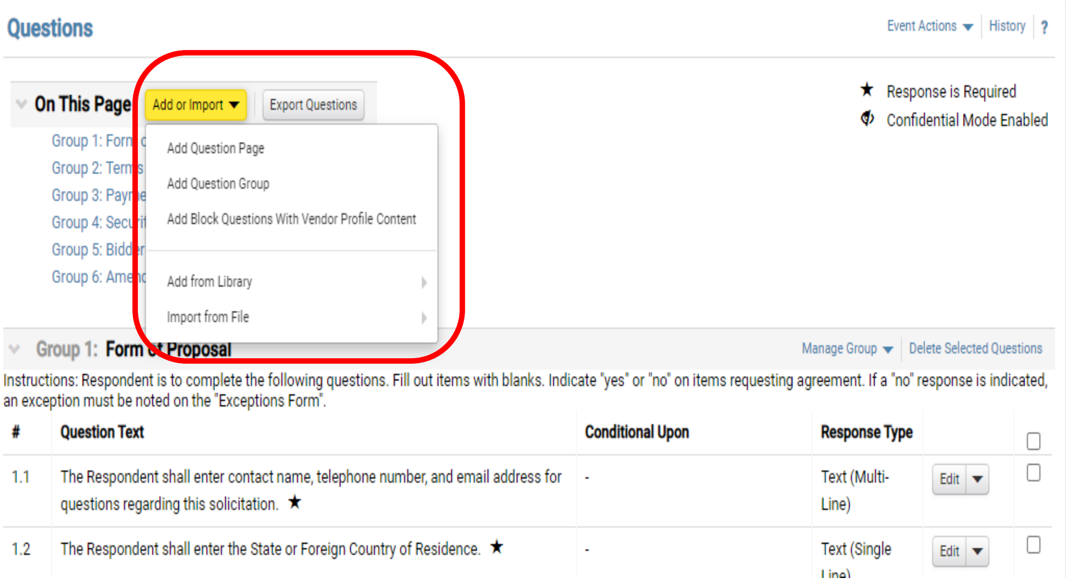
The Buyer may choose to **delete** the pre-loaded questions if they do not apply by selecting the **Edit** button.



Questions – Adding Groups from IMPACS Library

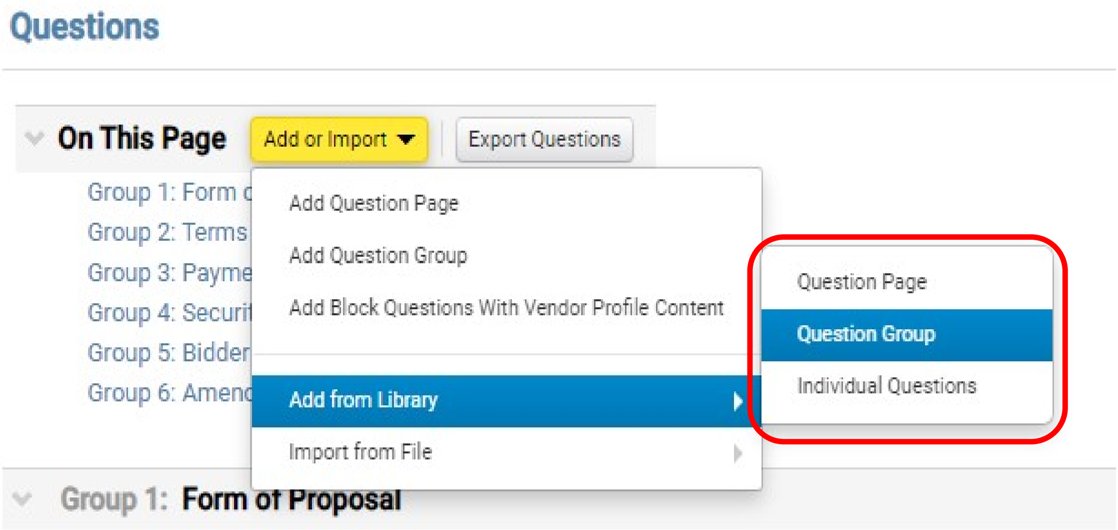
Additional **Question Groups** may be added from the **IMPACS Library** or imported from a file that the Buyer has saved to their computer or another location.

The Buyer may also add a blank **Question Page** or **Question Group.**



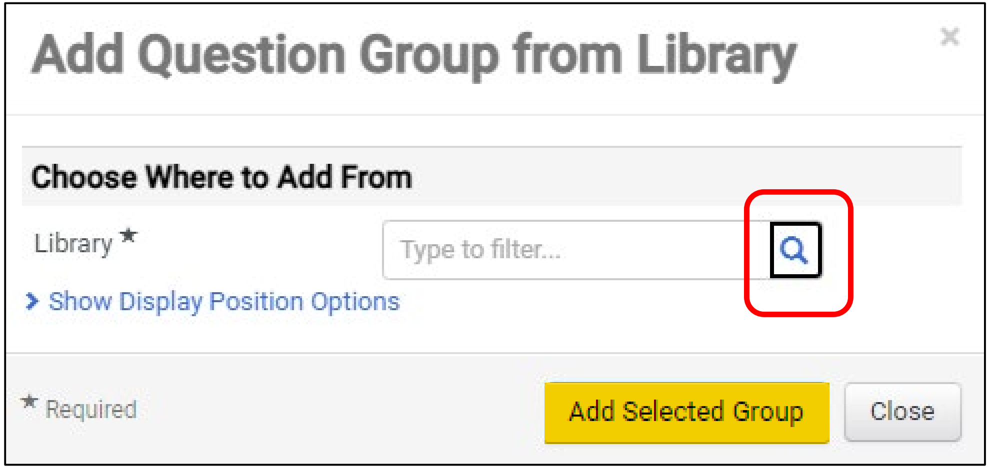
Question Group – Add from Library

If **Add from Library** is selected, there is a choice to add a preconfigured **Question Page**, **Question Group** or **Individual Questions**.



Question Group – Add Group from Library

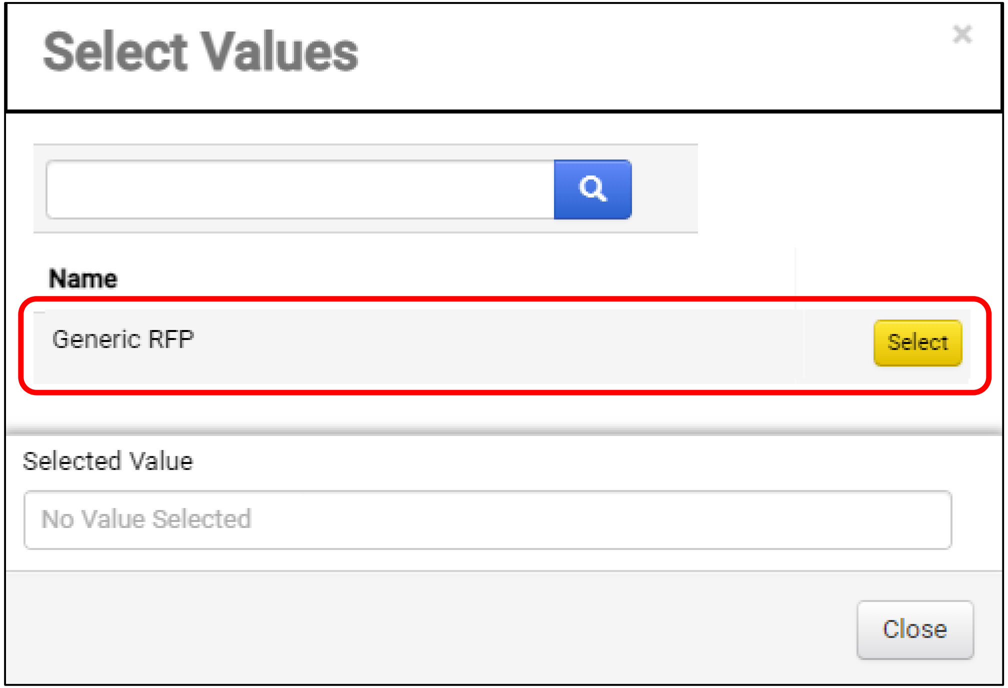
When Adding a Question Group from the Library, click on the **Search icon** to select a Question Group from the Library.



Question Group – Add Group from Library

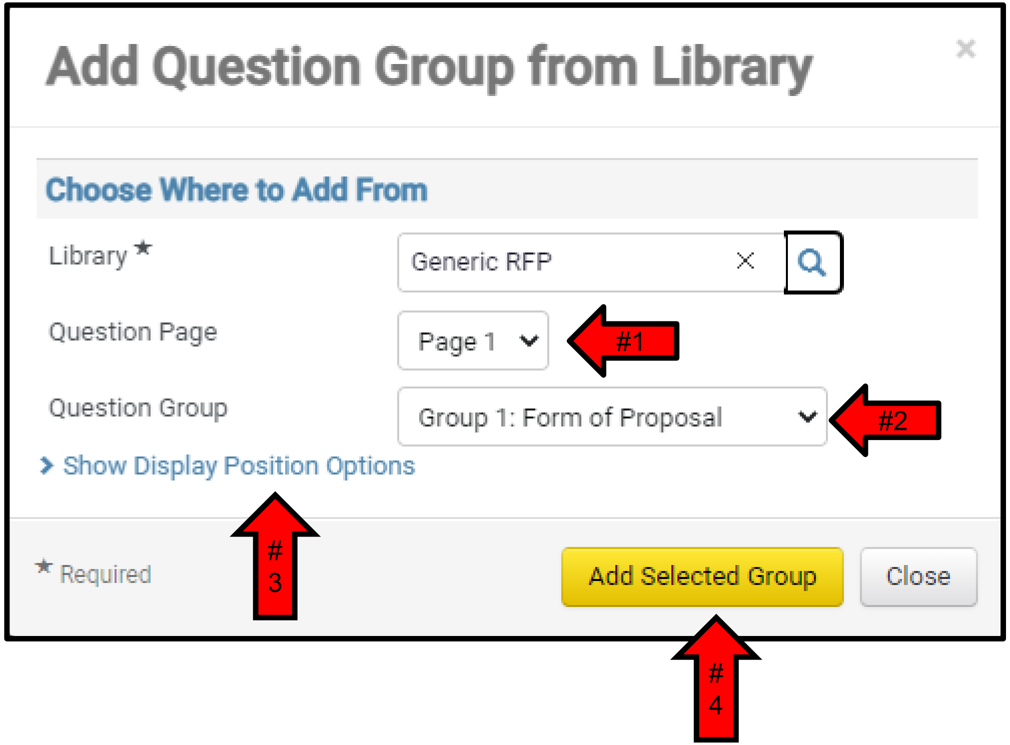
Select the Library that has the Question Group you are looking for.

Click the **Select** button.



Question Group – Add Group from Library

1. Select the **Page** where the **Question Group** will be located.
2. Select the **Question Group** from the Library to be added from the drop-down menu.
3. Select the Display Position of the Question Group (First, Last or anywhere in between).
4. Click the **Add Selected Group** button.



Question Group – Add Group from Library

Here is an example of an added **Question Group**.

This group is used when the Buyer posts an answer(s) to a Respondent question(s) in the **Question & Answer Section**, or if the Buyer posts an **Amendment** to the RFP in the **Buyer Attachments Section.**

Note the Instructions. **Every time the Buyer (Issuing Officer) modifies the RFP, AND if the Respondent has already submitted a Proposal, then the RESPONDENT must <u>acknowledge the change</u>, <u>Certify</u> and <u>Resubmit</u> their Proposal.**

Group 6: Amendments Manage Group ▼ Delete Selected Questions

Instructions: The Respondent must approve and resubmit their Proposal after an amendment has been posted by the Issuing Officer. If the Respondent submitted a Proposal before the amendment was posted, all information will be saved. The Respondent needs only to read and acknowledge the amendment. To acknowledge, answer the newly posted question in the Questions Section below ("yes" or "no"), and APPROVE and RESUBMIT your Proposal.

#	Question Text	Conditional Upon	Response Type		☐
6.1	Respondent acknowledges receipt of Addendum #. ★	-	Yes/No	Edit ▼	☐

Add Question ▲

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Questions Group

Manage Group

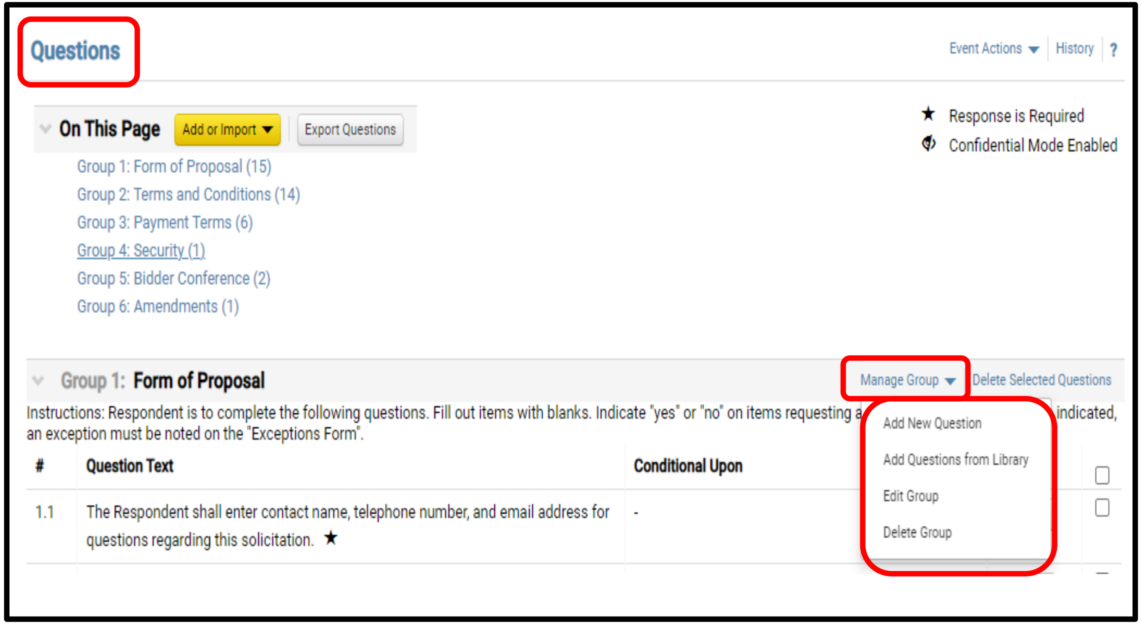
Question Group – Manage Group

To Manage a Group of Questions, select **Manage Group**.

From this link the Buyer may:

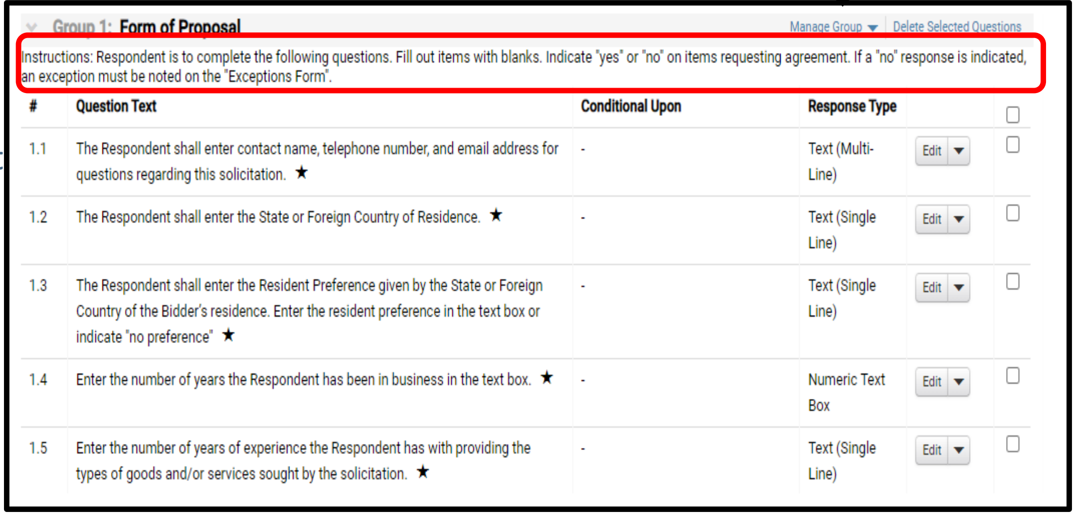
- **Add a New Question**
- **Add Questions from Library**
- **Edit Group**
- **Delete Group**

As you can see there are several ways to manage the **Questions Section.** Choose the way that works best for you.



Question Group – Manage Group

If the Buyer wants to change the **Instructions** to the Vendor, Click the **Manage Group** link and select **Edit Group**. There the Buyer will see the **Instructions** text and be able to modify the text or choose not to have instructions.


Group 1: Form of Proposal

Manage Group

Delete Selected Questions

Instructions: Respondent is to complete the following questions. Fill out items with blanks. Indicate "yes" or "no" on items requesting agreement. If a "no" response is indicated, an exception must be noted on the "Exceptions Form".

#	Question Text	Conditional Upon	Response Type		
1.1	The Respondent shall enter contact name, telephone number, and email address for questions regarding this solicitation. ★	-	Text (Multi-Line)	Edit	
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	Edit	
1.3	The Respondent shall enter the Resident Preference given by the State or Foreign Country of the Bidder's residence. Enter the resident preference in the text box or indicate "no preference" ★	-	Text (Single Line)	Edit	
1.4	Enter the number of years the Respondent has been in business in the text box. ★	-	Numeric Text Box	Edit	
1.5	Enter the number of years of experience the Respondent has with providing the types of goods and/or services sought by the solicitation. ★	-	Text (Single Line)	Edit	

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Questions Section

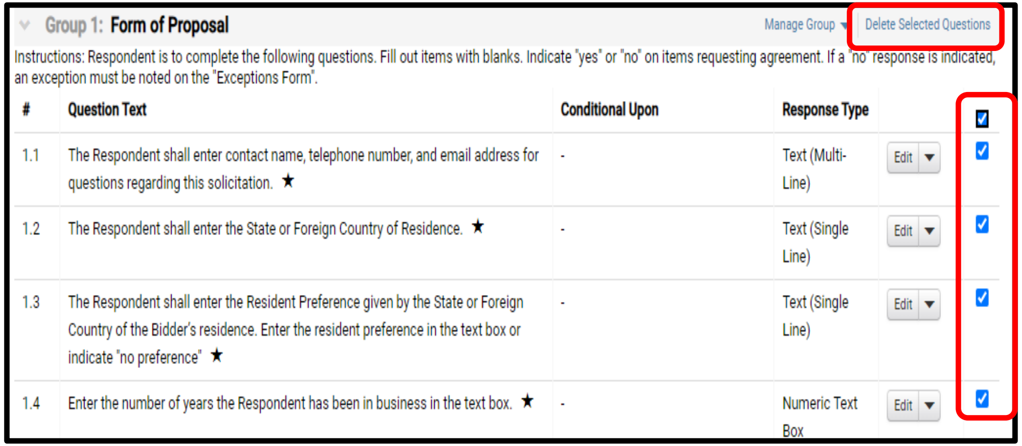
Edit & Delete

Questions - Edit & Delete

There is an option to edit each of the questions or delete the question.

This may be done by using the **Edit** box to the right of the question.

If the Buyer wants to delete multiple questions, select the checkboxes at the far right for the questions that are to be deleted and then click the **Delete Selected Questions** link.



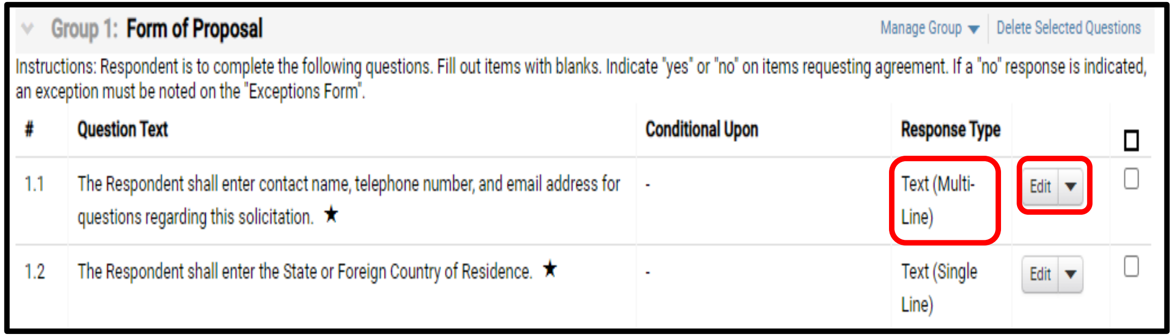
Questions – Response Type

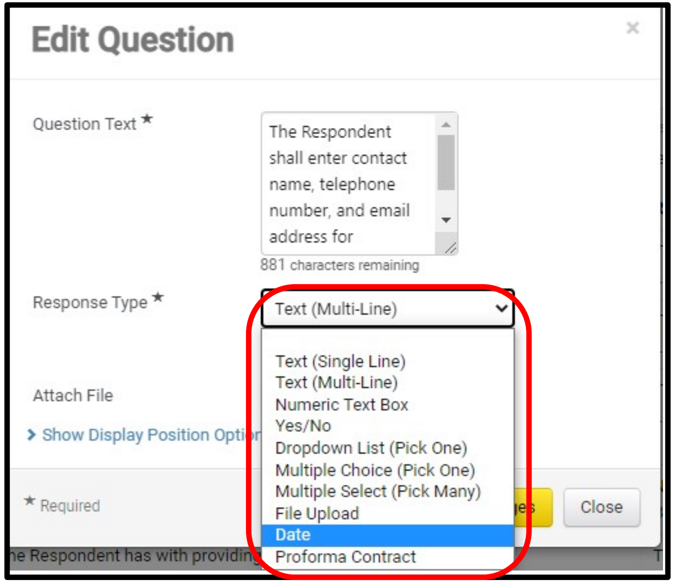
Each Question has a **Response Type.**

The Buyer may select from the drop-down menu.

New Questions can be created with the different Responses that can best obtain the information the Buyer needs for the RFP.

Save Changes when done editing.





Questions – Conditional Follow Up

Conditional actions or answers can be requested via the **Create Conditional Follow-Up** selection under the **Edit** button.

In this example, Question 1.12 asks for a **Yes** or **No** answer. If the Vendor answers **Yes**, then they will see **Follow-Up Question 1.13** which asks for a form to be filled out and uploaded. If they answer **No**, then Question 1.13 will not be visible to the Vendor.

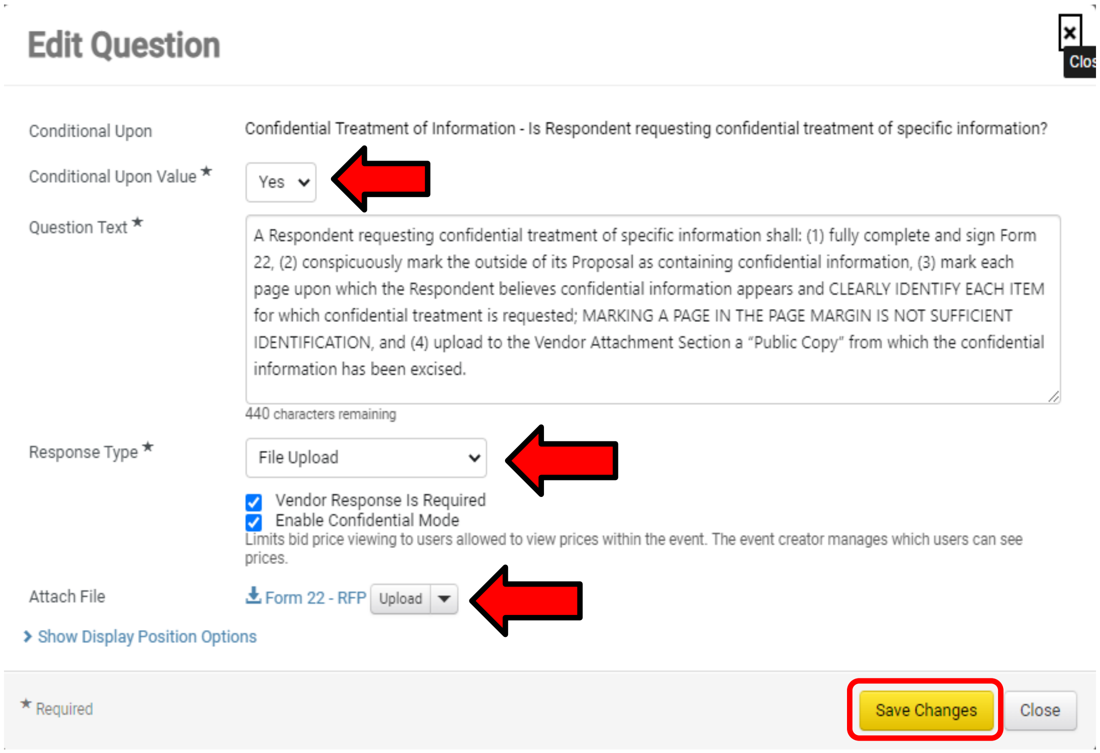
1.12	Confidential Treatment of Information - Is Respondent requesting confidential treatment of specific information? ★	-	Yes/No	Edit ▾ Edit Delete Create Conditional Follow Up
1.13	A Respondent requesting confidential treatment of specific information shall: (1) fully complete and sign Form 22, (2) conspicuously mark the outside of its Proposal as containing confidential information, (3) mark each page upon which the Respondent believes confidential information appears and CLEARLY IDENTIFY EACH ITEM for which confidential treatment is requested; MARKING A PAGE IN THE PAGE MARGIN IS NOT SUFFICIENT IDENTIFICATION, and (4) upload to the Vendor Attachment Section a "Public Copy" from which the confidential information has been excised. ★	Confidential Treatment of Information - Is Respondent requesting confidential treatment of specific information?	File Upload	

Questions – Conditional Follow Up

After selecting **Create Conditional Follow-Up,** the **Edit Question** box opens up and allows you to edit:

- **Conditional Upon Value**
- **Question Text**
- **Response Type**
- **Attach File**

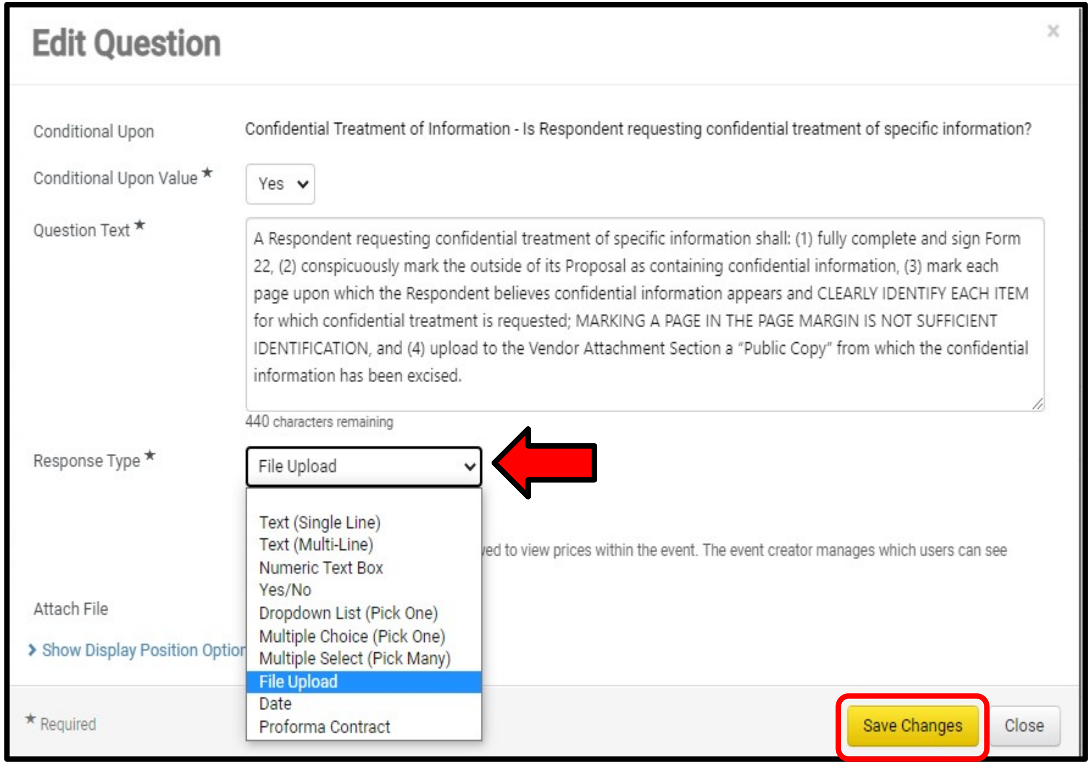
The Buyer may choose from several different **Response Types** from the dropdown box (See next page).



Questions – Conditional Follow Up

The **Response Type** has several options for the Buyer to structure the **Conditional Response.**

Save Changes after the changes have been made.



Questions – Dropdown List

Group 2 – Terms and Conditions also have preloaded Questions that can be deleted based on the requirements for the RFP.

The Respondent will respond to various Terms and Conditions using the **Dropdown List** response Type. The Terms and Conditions questions are structured for the Respondent to answer **Agree**, **Disagree**, or state in the **Exceptions Form** why they take exception to specific Terms & Conditions.

Group 2: **Terms and Conditions** Manage Group | Delete Selected Questions

Instructions: Respondent will read the following terms and conditions and attach the Exceptions Form in the Vendor Attachments section. The blank form is located in the Buyer Attachments section.

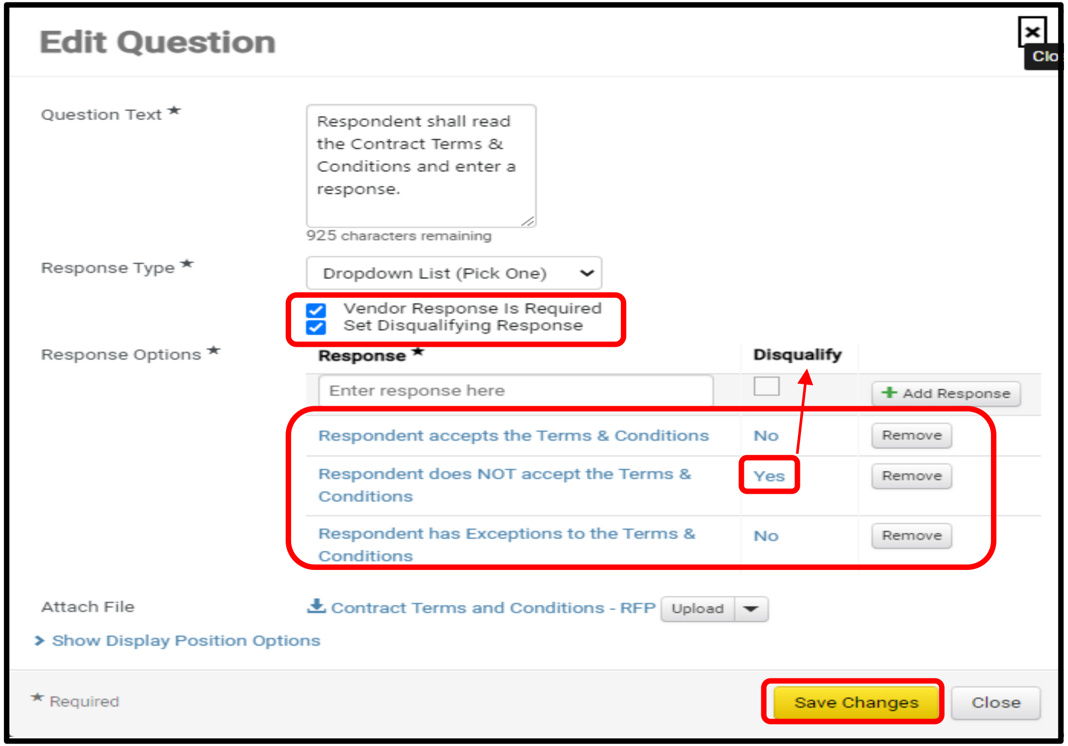
#	Question Text	Conditional Upon	Response Type	
2.1	Respondent shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.2	Respondent shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.3	Respondent shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.4	Respondent shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.5	Respondent shall read the Iowa Department of Homeland Security and Emergency Management Additional Terms and Conditions for Federal Compliance and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.6	Respondent shall read the Insurance Requirements and enter a response. (Issuing Officer add attachment) ★	-	Dropdown List (Pick One)	Edit
2.7	Public Entities (Political Subdivisions) - The resulting Contract will be made available to Political Entities, i.e. cities, counties, and schools. The Respondent shall enter a response. ★	-	Dropdown List (Pick One)	Edit
2.8	Nonprofit Entities - The resulting Contract will be made available to nonprofit entities that qualify under I.R.S. § 501 (c) provisions. The Respondent shall enter a response. ★	-	Dropdown List (Pick One)	Edit
2.9	Quarterly Sales Report - The Respondent shall provide a detailed quarterly report in Microsoft Excel on ALL sales made under the Contract via e-mail to the Iowa Department of Administrative Services. The Respondent shall enter a response. ★	-	Dropdown List (Pick One)	Edit
2.10	Administrative Fee - In addition to the approved discounts or prices specified in the Contract herein, the successful Respondent shall pay to the Agency a 1.00% Administrative Fee on all sales made against this Contract. The fee shall be paid quarterly to the Iowa Department of Administrative Services. The Respondent shall enter a response. ★	-	Dropdown List (Pick One)	Edit
2.11	Service Terms and Conditions - The Contract(s) that the Agency expects to award as	-	Yes/No	Edit

Questions – Dropdown List

The Buyer may modify the question and attach files using the Edit button.

If the Respondent **does NOT agree** to the Terms & Conditions question, then they **cannot move forward** with submitting a Proposal.

Note that the checkbox next to **Set Disqualifying Response** is checked and the Response: Respondent does NOT agree to the (Terms) is set to **YES. Yes = Disqualify** and the Respondent cannot move forward with submitting a Proposal.



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Additional Item Fields

Add Specifications to Items or create your own Item Field (Optional)

Currently NOT IN USE

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Price Components

Currently NOT IN USE

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Items

Product Line Items and Service Line Items

Currently NOT IN USE

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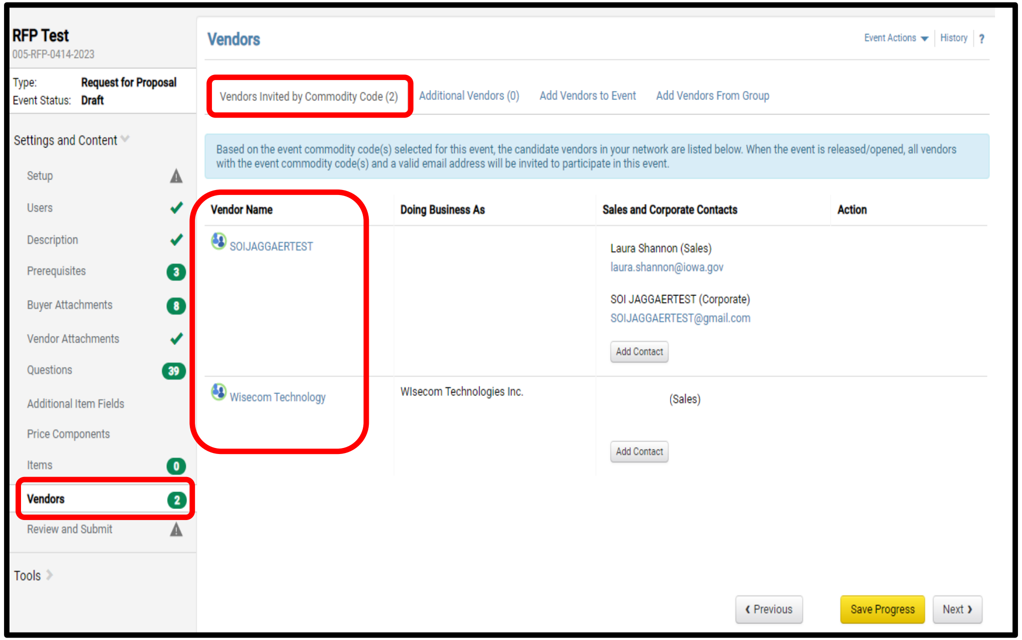
Vendors

Vendors Invited by Commodity Code

Add Vendors to the Event

Vendors Invited by Commodity Code

If there are Vendors that have registered under the Commodity Codes that were entered earlier – either in the Setup Section or under the Items Section, then you will see the number of Vendors that will be notified when the RFP goes "Live".

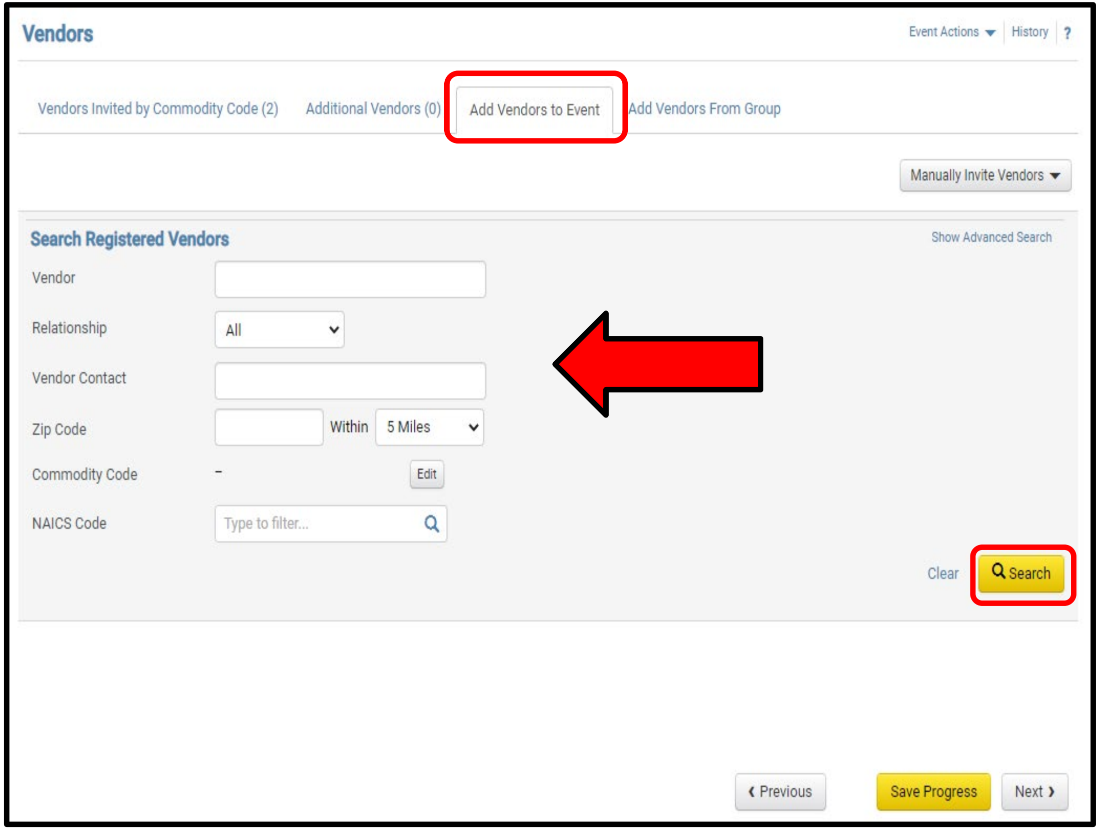


Add Vendors to Event

The Buyer may add Vendors to be notified manually.

Under the Add Vendors to Event Tab, a Search Window opens that will allow the Buyer to search for Vendors registered in the IMPACS system.

Enter the information and click **Search**.



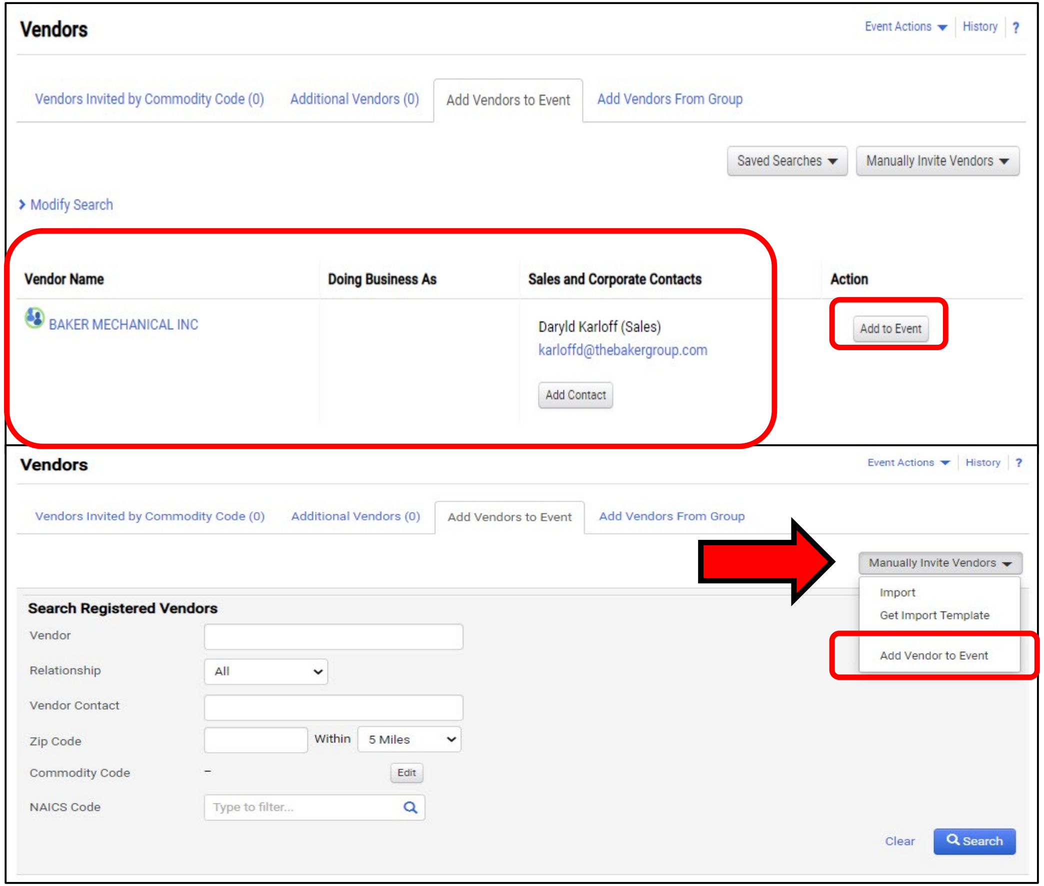
Add Vendors to the Event & Manually Invite Vendors

If the Vendor is registered, then the results will show the **Vendor's Name** and **Contact** information. Click **Add to Event** to add the Vendor for RFP notification.

The Buyer may also fill out a template with the names of the unregistered Vendors they would like to add to the RFP.

Click on the Manually Invite Vendors Dropdown box.

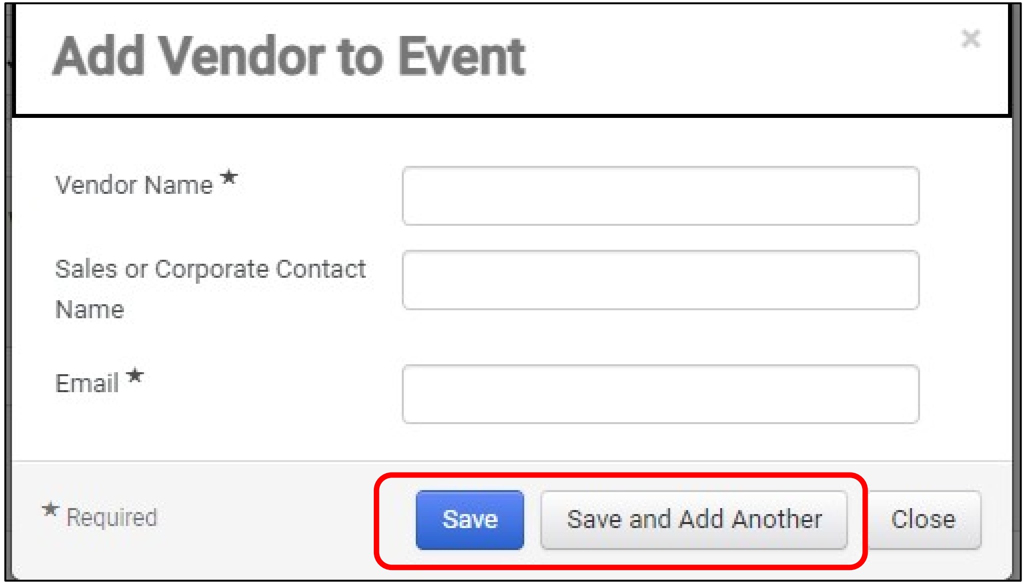
Select **Add Vendor to Event**



Manually Invite Vendors – Add Vendor to Event

The Buyer can now add unregistered Vendors to the Event notification.

Repeat as necessary by clicking **Save and Add Another** or **Save** to move on.



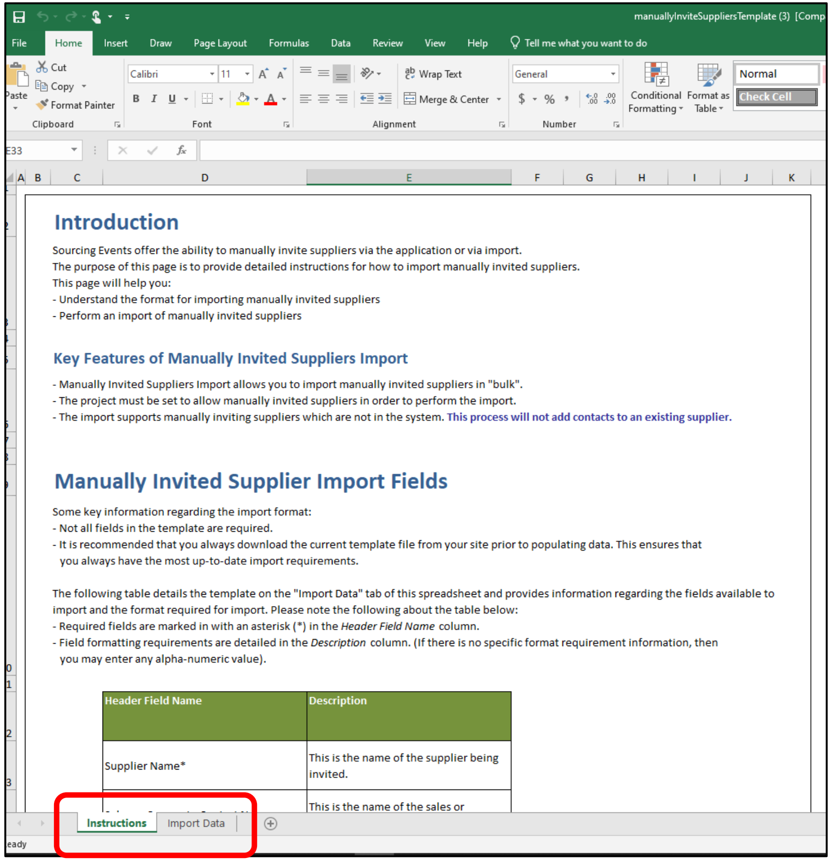
Manually Import Vendors

If the unregistered Vendor list is long and you want to use a template and import the information into IMPACS then click on the **Manually Invite Vendors** drop-down box.

Select **Get Import Template.**

Once the Template is downloaded, the Buyer will see an **Instructions Page** and the **Import Data Page**.

Fill out the **Import Data Page** with the Vendor information.

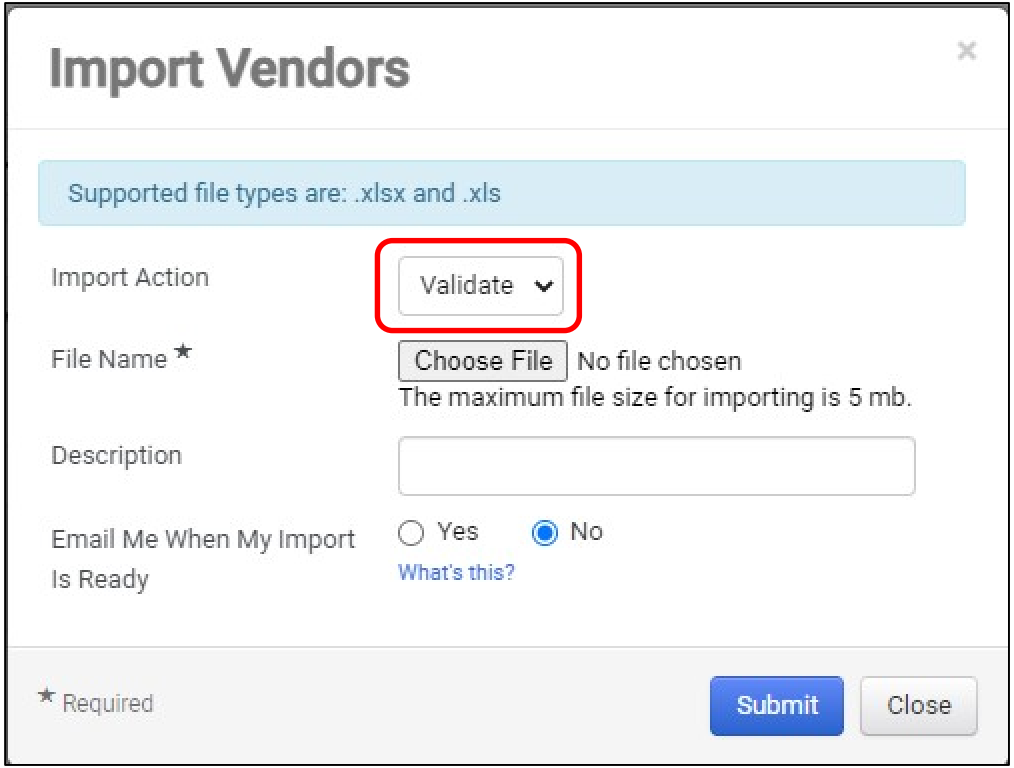


Import Vendors

When the spreadsheet is ready, navigate back to the **Vendors** main page and select **Manually Invite Vendors - Import Vendors.**

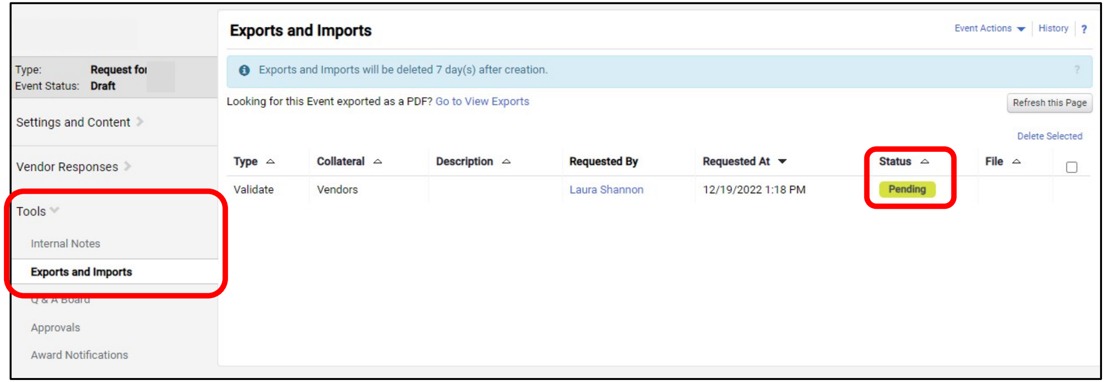
For **Import Action**, Select **Validate.**

This action will validate the email address and make sure that it is a valid email address.

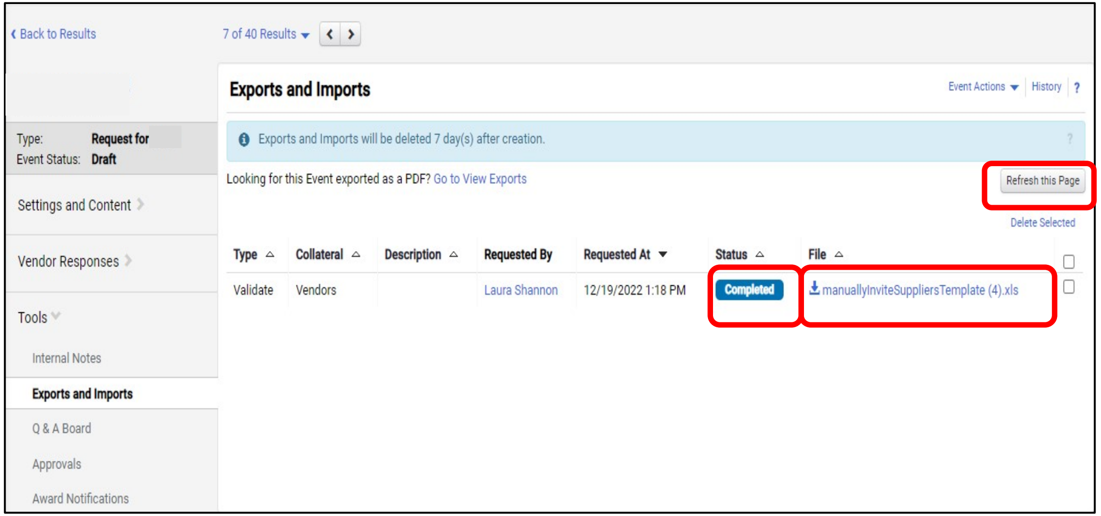


Validation of Vendor File

It might take a few minutes for IMPACS to validate the spreadsheet. The Buyer may track the progress of the validation process under the **Tools Menu – Exports and Imports** on the left side of the screen.



Refresh the page often.



Download the validated file and save it to your computer.

Import Vendor File

When the Buyer is ready to import the validated file, navigate back to the **Vendors** main page and select **Manually Invite Vendors - Import Vendors.**

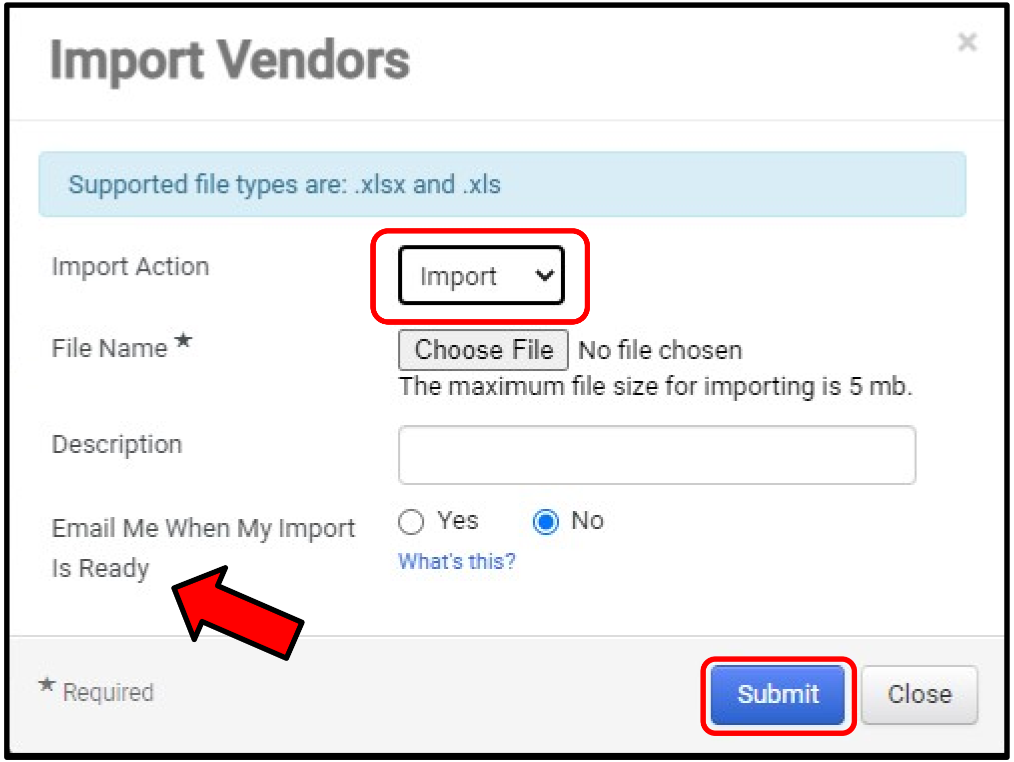
For **Import Action**, Select **Import.**

The Buyer may track the progress of the Validation Process under the **Tools Menu – Exports and Imports** on the left side of the screen.

Refresh the page often.

Or, you may select **Email Me When My Import Is Ready**, and the Buyer will receive an email when the file is ready.

Click **Submit.**

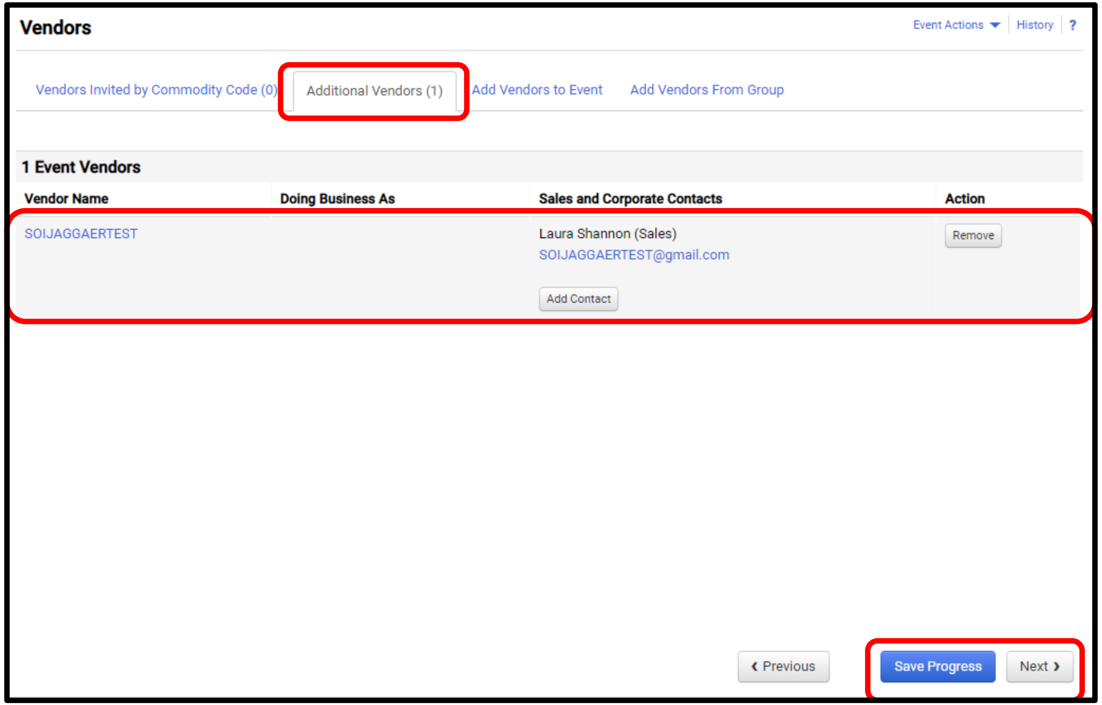


Additional Vendors

Once the file has been imported, or if the Buyer selected the **Add Vendor to Event** option, then the number of additional Vendors will be indicated in parenthesis in the **Additional Vendors** tab.

The Vendor information will be listed under the tab. The Buyer may remove a Vendor here.

Save Progress or **Next**.



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Review and Submit

Errors and Approval

Review and Submit

The last step is to **Review and Submit**.

If there are errors, an error message will appear and indicate the error to be corrected. The error language is a link that will take you back to the item in question.

After the error is corrected, be sure to **Save Progress** on that page.

Once all errors have been addressed, click **Submit for Approval.**

The RFP will enter the approval workflow and the approver will either Approve or send the RFP back for revisions.