



**Department of
Administrative Services**

*Empowering People
Collaboration
Customer Service*

IMPACS (Jaggaer) RFP

Step-by-Step Guide for Request for Proposal Creation

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

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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:

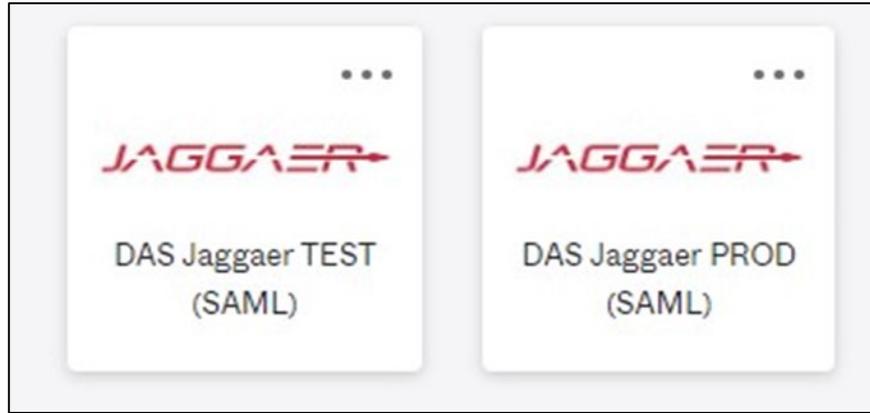
1. Creating the Request for Proposal (RFP)
2. Posting the RFP on IMPACS and Bid Opportunities
3. Receiving and Opening the Proposals
4. Evaluating and Scoring the Proposals
5. Awarding the Contract
6. Negotiating the Contract
7. Generating the Contract

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



The screenshot shows the Shop Dashboard interface. The left menu is visible on the left side, with a red box highlighting the bottom section containing a magnifying glass icon, the text "Menu Search", and a small left-pointing arrow. The main content area displays the "Shop Dashboard - LS" with a search bar and a table of draft carts.

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



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



Create New Event

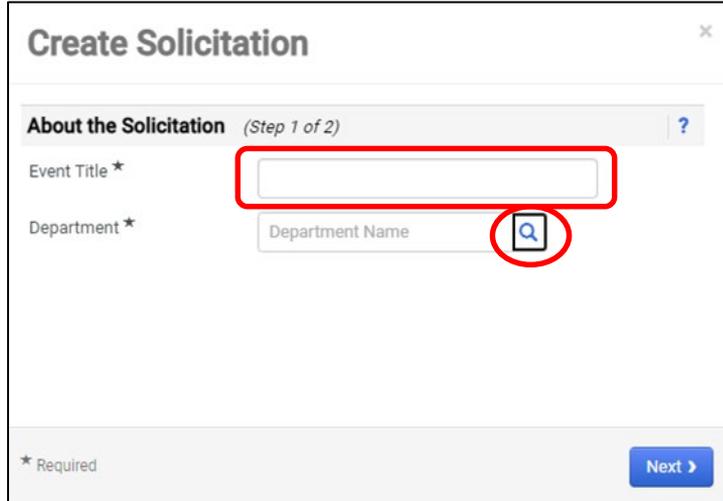
Open the **Sourcing** Menu. Select the **Solicitations** Sub-menu and **Create New Event**.



The screenshot displays the 'Solicitations Dashboard - LS' interface. On the left is a dark navigation sidebar with icons for Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Sourcing, Reporting, Administer, and Setup. The 'Sourcing' menu is expanded, showing sub-options: Solicitations, Approvals, Templates and Libraries, Reports, Requests, and Sourcing Administration. The 'Solicitations' sub-menu is further expanded, with 'Create New Event...' highlighted by a red box. Other options in this sub-menu include 'Solicitations Home', 'Search Events', 'Create New Quick Quote Event', 'Sourced Contract Advance Notice', and 'View Exports'. The main content area shows a 'My Events' section with a table of events. The first event is '005-RFB-0159-2022' with a status of 'Draft' and title 'Rehabilitation and In System (CMS)'. Other events in the table include '005-RFB-0254-2023' (Under Evaluation, RFB Test010) and '005-RFB-0255-2023' (Under Evaluation, RFB Test 17011).

Event Number	Event Status	Event Title
005-RFB-0159-2022	Draft	Rehabilitation and In System (CMS)
005-RFB-0254-2023	Under Evaluation	RFB Test010
005-RFB-0255-2023	Under Evaluation	RFB Test 17011

Create Solicitation



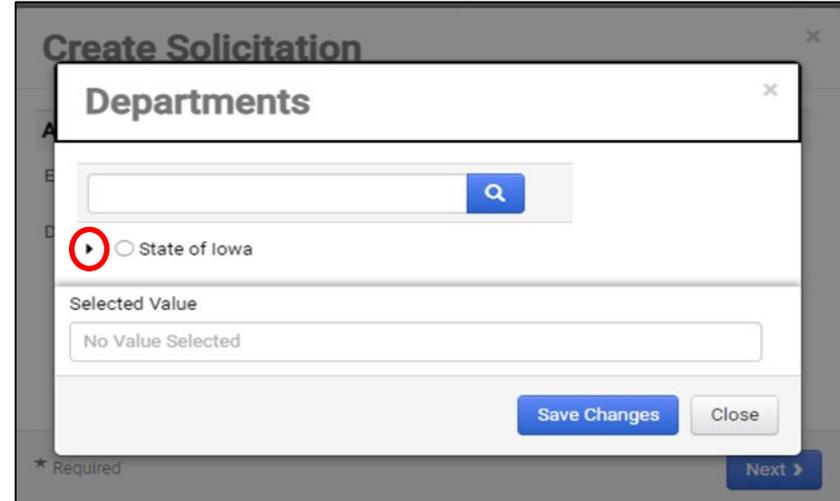
Create Solicitation ✕

About the Solicitation (Step 1 of 2) ?

Event Title *

Department *

* Required Next ▶



Create Solicitation ✕

Departments ✕

State of Iowa

Selected Value

* Required Save Changes Close Next ▶

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.



Departments

Search: [] [Q]

- State of Iowa
 - Administrative Services
 - DAS-General Services
 - DAS-General Services-Capitals
 - DAS-General Services-Fleet and Mail
 - 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

Selected Value: [No Value Selected]

Save Changes Close

About the Solicitation

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

Select **Request for Proposal**



Create Solicitation ✕

About the Solicitation *(Step 2 of 2)* ?

Event Type *  

Create from Template 

* Required ◀ Previous Create Solicitation

Create Solicitation ✕

About the Solicitation *(Step 2 of 2)* ?

Event Type *  

Create from Template 

- Invitation to Qualify 
- Request for Bid - Construction
- Request for Bids
- Request for Information
- Request for Proposal**
- Request for Quote

* Required ◀ Previous Create Solicitation

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**.

The screenshot shows two parts of a software interface. The top part is a 'Create Solicitation' window, 'Step 2 of 2'. It has a search bar for 'Event Type' and another for 'Template Name'. A red box highlights the 'Template Name' search bar, with a red arrow labeled '#1' pointing to it. Below this, a red arrow labeled '#3' points to the 'Create Solicitation' button. The bottom part is a 'Solicitation Templates' window. It has a search bar and a table with one row: 'Generic RFP' and a 'Select' button. A red arrow labeled '#2' points to the 'Select' button. Below the table is a 'Selected Value' field showing 'No Value Selected' and a 'Close' button.



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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.

The screenshot displays the 'Generic RFP Test' configuration page in the IMPACS system. The left-hand navigation menu is highlighted with a red box, showing the following items: Settings and Content (selected), Setup, Users, Description, Prerequisites, Buyer Attachments, Vendor Attachments, Questions, Additional Item Fields, Price Components, Items, Vendors, Review and Submit, and Tools. The main content area is titled 'Generic RFP Test' and includes the following sections:

- Setup:** Event Title (Generic RFP Test), Event Type (Request for Proposal), Department (Administrative Services), Event Number (005-RFP-0311-2023), Stage Title.
- Commodity Codes:** Reporting Commodity Code, Additional Commodity Codes.
- Payment:** Currency (US Dollar), Estimated Value, Payment Terms.
- Bid and Evaluation:** Sealed Bid (Yes), Respond by Proxy (No), Use Evaluation Committee (No), Auto Score (No).

At the bottom right, there are 'Save Progress' and 'Next' buttons. A legend indicates that a star symbol (*) denotes a required field.

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.



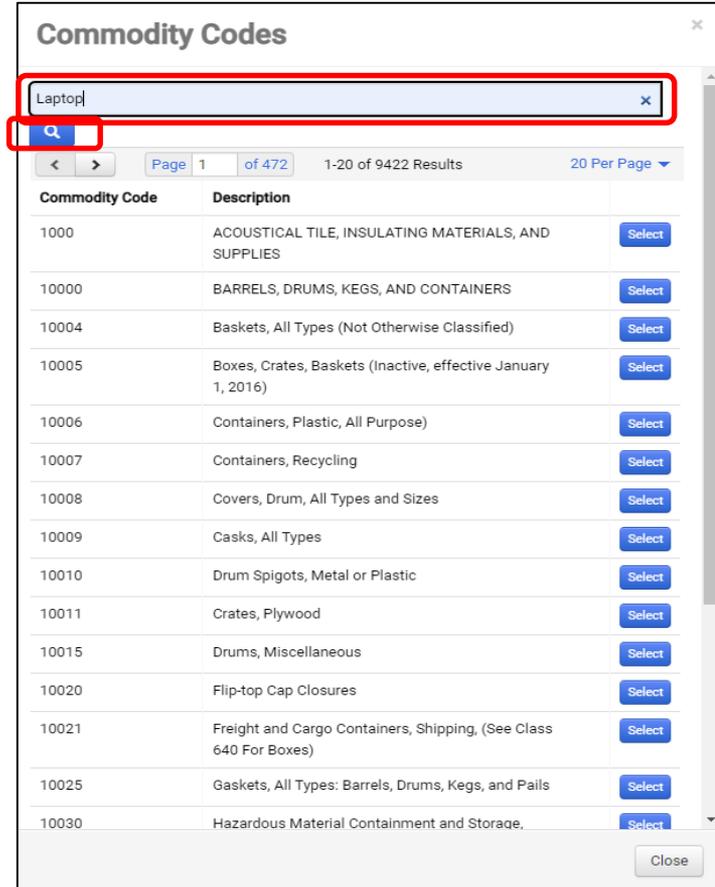
The screenshot shows the "Setup" page for an RFP. The form is divided into several sections, each with a dropdown arrow on the left. The fields and their values are as follows:

- Event Title ***: Generic RFP Test (Red arrow #1 points to the text input field)
- Event Type**: Request for Proposal
- Department**: Administrative Services
- Event Number ***: 005-RFP-0311-2023 (Red arrow #2 points to the pencil icon next to the text)
- Stage Title**: (Red arrow #3 points to the empty text input field)
- Commodity Codes** (Section with dropdown arrow):
 - Reporting Commodity Code**: - (Red arrow #4 points to the "Edit" button next to it)
 - Additional Commodity Codes**: - (Red arrow #4 points to the "Edit" button next to it)
 - Forced Vendor Invitation by Commodity Code**: Yes
- Payment** (Section with dropdown arrow):
 - Currency**: US Dollar
 - Estimated Value**: (Empty text input field) USD
 - Payment Terms**: (Empty dropdown menu)
- Bid and Evaluation** (Section with dropdown arrow):
 - Sealed Bid**: Yes
 - Respond by Proxy**: No (Selected)
 - Use Evaluation Committee**: No (Selected)
 - Auto Score**: No (Selected)

At the bottom of the form, there is a legend: ★ Required. On the right side, there are two buttons: "Save Progress" and "Next >".

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.



Commodity Codes

Laptop

Page 1 of 472 1-20 of 9422 Results 20 Per Page

Commodity Code	Description	
1000	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	Select
10000	BARRELS, DRUMS, KEGS, AND CONTAINERS	Select
10004	Baskets, All Types (Not Otherwise Classified)	Select
10005	Boxes, Crates, Baskets (Inactive, effective January 1, 2016)	Select
10006	Containers, Plastic, All Purpose)	Select
10007	Containers, Recycling	Select
10008	Covers, Drum, All Types and Sizes	Select
10009	Casks, All Types	Select
10010	Drum Spigots, Metal or Plastic	Select
10011	Crates, Plywood	Select
10015	Drums, Miscellaneous	Select
10020	Flip-top Cap Closures	Select
10021	Freight and Cargo Containers, Shipping, (See Class 640 For Boxes)	Select
10025	Gaskets, All Types: Barrels, Drums, Kegs, and Pails	Select
10030	Hazardous Material Containment and Storage.	Select

Close



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.

Commodity Code	Description	
20454	*Microcomputers, Laptop, Notebook and Tablets	Select
20554	*Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products	Select
5567	Mounting Hardware: Laptops, GPS, Cameras, Electronic Devices, etc. Automotive.	Select
98424	Computers, Microcomputer, Handheld, Laptop and Notebook, Rental or Lease	Select

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.

The screenshot shows a form with two main sections: 'Commodity Codes' and 'Payment'. In the 'Commodity Codes' section, the 'Forced Vendor Invitation by Commodity Code' field is set to 'Yes' and is highlighted with a red arrow. In the 'Payment' section, the 'Currency' field is set to 'US Dollar' and is circled in red. The 'Estimated Value' field is empty, and the 'Payment Terms' field is a dropdown menu. A red arrow points to the 'USD' label next to the 'Estimated Value' field.

Commodity Codes	
Reporting Commodity Code	- <input type="button" value="Edit"/>
Additional Commodity Codes	- <input type="button" value="Edit"/>
Forced Vendor Invitation by Commodity Code	Yes

Payment	
Currency	US Dollar
Estimated Value	<input type="text"/> USD
Payment Terms	<input type="text"/>

Setup -Payment

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

Commodity Codes

Reporting Commodity Code 20454 - *Microcomputers, La...

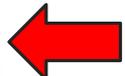
Additional Commodity Codes -

Forced Vendor Invitation by Commodity Code Yes

Payment

Currency US Dollar

Estimated Value USD

Payment Terms 

Bid and Evaluation

Sealed Bid ⓘ

Respond by Proxy ⓘ

Use Evaluation Committee ⓘ

- 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



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.

▼ Bid and Evaluation	
Sealed Bid 	Yes
Respond by Proxy 	<input type="radio"/> Yes <input checked="" type="radio"/> No
Use Evaluation Committee 	<input type="radio"/> Yes <input checked="" type="radio"/> No
Auto Score	<input type="radio"/> Yes <input checked="" type="radio"/> No
Cost Analysis 	<input type="radio"/> Yes <input checked="" type="radio"/> No
Alternate Items 	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Split Item Quantity in Evaluations 	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enforce Minimum Price	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enforce Maximum Price	<input type="radio"/> Yes <input checked="" type="radio"/> No
▼ Display and Communication	
Visible to Public	Yes
Public Event Short Description	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p>200 characters remaining</p>
Restrict Buyer Notifications	Yes



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.

▼ Dates

Time Zone

Open Date ★   

Close Date ★

Sealed Bid Open Date ★

Show Sealed Bid Open Date to Vendor or

Q&A Submission Close Date ★

December 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

December 5, 2022

mm/dd/yyyy hh:mm a

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.

The screenshot shows the 'Dates' section of a wizard. It includes the following fields and options:

- Time Zone:** A dropdown menu set to 'CDT/CST - Central Standard Time (US/Cent)'.
- Open Date ***: A date input field with a calendar icon and a clear button. A red arrow labeled '#1' points to this field.
- Close Date ***: A date input field with a calendar icon and a clear button. A red arrow labeled '#2' points to this field.
- Sealed Bid Open Date ***: A checkbox labeled 'Same as Close Date' which is checked.
- Show Sealed Bid Open Date to Vendor:** A checkbox labeled 'Show Sealed Bid Open Date to Vendor' which is checked.
- Q&A Submission Close Date ***: A date input field with a calendar icon and a clear button. A red arrow labeled '#3' points to this field. A red box highlights the checkbox 'Same as Close Date' next to it.

At the bottom right, there are two buttons: 'Save Progress' and 'Next >'. A red arrow labeled '#4' points to the 'Save Progress' button.





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Buyers

Add & Edit Buyers

Buyer

S

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 Approver 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.

Generic RFP Test

005-RFP-0311-2023

Type: **Request for Proposal**
Event Status: **Draft**

Settings and Content ▾

- Setup ▲
- Users** ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 0
- Vendor Attachments ✓
- Questions 4
- Additional Item Fields
- Price Components
- Items 0
- Vendors 0
- Review and Submit ▲

Tools >

Users

Event Actions History ?

ⓘ Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, solicitations can still be created and executed but not all users will receive notifications and e-mails.

Event Creator * Shannon, Laura

Event Owners *
Event Owners have full control over this event: #1
Shannon, Laura

Event Managers on this Department have full control over this event:
Role: Admin (2 users)
Role: Procurement (0 users)
Department: Department of Administrative Services (005) (13 users)

Contacts *
Contact information for these users is shown to vendors: #2
Shannon, Laura

Stakeholders
Stakeholders can view the event and responses: #3
No User Selected

Notification Recipients *
Only Notification Recipients will be eligible to receive system-generated event notifications. #4
Shannon, Laura

★ Required

◀ Previous Save Progress Next ▶

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.

User Search

Search Box: More Options

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Name	Select
Brennan, Kelli A	Select
Buyer, Betty	Select
Test, Buyer	Select
Removed_7970691 (inactive)	Select
Jacobus, Todd	Select
Fitzgerald, Michael	Select
Woolery, Dale	Select
Pate, Paul	Select
Strawn, Matthew	Select
Bayens, Stephan	Select

Page 1 of 91 | 1-10 of 906 Results | 10 Per Page

Selected Values:

Save Changes Close

Buyers - continued

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



RFB Test 014
005-RFB-0267-2023

Type: **Request for Bids**
Event Status: **Draft**

Settings and Content ▾

- Setup ▲
- Users** ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 35
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0
- Review and Submit ▲

Tools >

Users Event Actions ▾ History ?

? Solicitations have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, solicitations can still be created and executed but not all users will receive notifications and e-mails.

Event Creator * [Shannon, Laura](#)

Event Owners *
Event Owners have full control over this event. Edit Users
[Shannon, Laura](#)
Event Managers on this Department have full control over this event.
Role: Admin (4 users)
Role: Procurement (1 users)

Contacts *
Contact information for these users is shown to vendors: Edit Users
[Shannon, Laura](#)

Stakeholders
Stakeholders can view the event and responses: Edit Users
No User Selected

Notification Recipients *
Only Notification Recipients will be eligible to receive system-generated event notifications. Edit Users
[Shannon, Laura](#)

★ Required

← Previous **Save Progress** Next >



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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.

The screenshot displays the 'RFB Test 014' (005-RFB-0267-2023) configuration page. The left sidebar lists various settings, with 'Description' selected and highlighted in red. The main content area features a 'Description' section, also outlined in red, which includes a rich text editor with a green highlight and a 'Stage Description' section below it. At the bottom right, the 'Save Progress' button is highlighted in red. The interface includes a top navigation bar, a breadcrumb trail, and a 'Tools' section at the bottom.

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.



Description

Event Actions | History | ?

Copy from Library

Please enter a description for this event, or copy from library. *

Paragraph | Arial, Helvetica, sans-s | 3 (12pt) | B | I | U | A | [List Icons] | [Link Icon] | [Image Icon]

×₂ ×² [Grid Icon] </>

Issuing Officer must edit or delete the highlighted text below.

It is advised to "Save Progress" often and especially after uploading documents.

NOTE: Anytime the Respondent opens their proposal after the initial submission, they MUST certify and resubmit. No information will be lost from the initial submission.

NOTE: Respondent must approve and resubmit their proposal after an amendment has been posted by the Issuing Officer. If the bid was submitted before the amendment, all information will be saved. The Respondent only needs to read and acknowledge the amendment.

Instructions for Amendments: Answer the newly posted question in the Questions Section, and CERTIFY and SUBMIT your proposal again (if previously submitted).

Insert Background information.

Contract Term

The term of the contract will begin [redacted] and end on [redacted].

Option 1: The Contract may be renewed by mutual agreement of both parties for [redacted].

Option 2: The Agency shall have the sole option to renew the contract upon the same or more favorable terms and conditions for up to [redacted] annual extensions. **The resulting contract will be available to all State Agencies.**

Description of Goods or Services

Sales History, Agencies/Facilities that use, Other information

Site visit?



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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 History | ?

Add New Prerequisite ★ Required to Enter Bid

Instructions to vendor	Prerequisite Content	
Respondent shall read and make certifications of their Proposal. ★	Certification of Proposal	Actions ▼
Respondent shall read and authorize to release information for their Proposal. ★	Authorization to Release Information	Actions ▼
Mandatory Respondents Conference - The State will hold a mandatory Respondents conference in conjunction with this RFP.	Mandatory Respondents Conference	Actions ▼

Save Progress

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

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**

The screenshot shows the 'Prerequisites' management interface. At the top, there is a table with columns 'Instructions to vendor' and 'Prerequisite Content'. A table row is highlighted, showing 'Respondent shall read and make certifications of their Proposal.' and 'Certification of Proposal'. An 'Actions' dropdown menu is open, showing 'Edit Properties' and 'Delete'. A red arrow labeled '#1' points to the 'Actions' dropdown.

The 'Edit Prerequisite' modal is open, showing the following fields and controls:

- 'Instructions to vendor *': A text area containing 'Respondent shall read and make certifications of their Proposal.' with a character count of 936. A red arrow labeled '#2' points to this text area.
- 'Prerequisite Content *': A dropdown menu with 'Enter text directly (or copy and paste)' selected. A red arrow labeled '#3' points to this dropdown.
- 'Type *': A dropdown menu with 'Required to Enter Bid' selected. A red arrow labeled '#4' points to this dropdown.
- 'Certification Text *': A text area containing 'I certify that the contents of the Proposal submitted' with a character count of 424. A red arrow labeled '#5' points to this text area.
- 'Vendor Must Also Upload a File': A checkbox that is currently unchecked. A red arrow labeled '#5' points to this checkbox.
- 'Show Display Position Options': A link to show options for the prerequisite's position.
- 'Save Changes': A button highlighted with a red box and a red arrow labeled '#6' pointing to it.
- 'Close': A button next to 'Save Changes'.

A 'Save Progress' button is visible in the bottom right corner of the main interface.



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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 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

Add New Attachment

1-8 of 8 Results

Attachment ▲	Size
RFP - Exceptions Form.docx	20 K
Terms and Conditions for Federal Compliance.pdf	165
GOODS Terms and Conditions 05.1.16.pdf	223
Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	130

Add Attachment

Attachment Type * File Link

File * **Select files...** *Drop files to attach, or browse.*

Comments

1000 characters remaining

Display Order * **Last**

* Required

Save Changes Close



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	Actions
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	Actions
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	Actions
Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	1	130 KB	Laura Shannon	3/24/2023 2:11:30 PM	Actions
SERVICES Terms and Conditions 05.1.16.pdf	1	303 KB	Laura Shannon	3/24/2023 2:11:31 PM	Actions

Actions dropdown 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.

The screenshot shows a software interface for an RFP. On the left is a sidebar menu with the following items: Setup (▲), Users (✓), Description (✓), Prerequisites (3), Buyer Attachments (8), **Vendor Attachments (✓)** (highlighted with a red box), Questions (39), Additional Item Fields, Price Components, Items (0), Vendors (0), and Review and Submit (▲). Below the menu is a 'Tools' section with a right-pointing arrow. The main content area is titled 'Vendor Attachments' and contains a light blue banner with the text: 'For this event vendors will be able to upload attachments with their bid response.' In the top right corner of the main area, there is a 'History' link and a question mark icon. At the bottom right of the interface, there are 'Previous' and 'Next' navigation buttons.



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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.

RFP Test
005-RFP-0414-2023

Type: Request for Proposal
Event Status: Draft

Settings and Content

- Setup ▲
- Users ✓
- Description ✓
- Prerequisites 3
- Buyer Attachments 8
- Vendor Attachments ✓
- Questions 29**
- Additional Item Fields
- Price Components
- Items 0
- Vendors 0
- Review and Submit ▲

Tools >

Questions [Event Actions] [History]

★ Response is Required
⚙ Confidential Mode Enabled

On This Page Add or Import Export Questions

- Group 1: Form of Proposal (15)
- Group 2: Terms and Conditions (14)
- Group 3: Payment Terms (6)
- Group 4: Security (1)
- Group 5: Bidder Conference (2)
- Group 6: Amendments (1)

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] <input type="checkbox"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	[Edit] <input type="checkbox"/>
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] <input type="checkbox"/>
1.4	Enter the number of years the Respondent has been in business in the text box. ★	-	Numeric Text Box	[Edit] <input type="checkbox"/>
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] <input type="checkbox"/>
1.6	Describe the level of technical experience in providing the types of goods and/or services sought by the solicitation. Enter the information in the text box or upload a document to the Vendor Attachments Section. ★	-	Text (Multi-Line)	[Edit] <input type="checkbox"/>
1.7	List all goods and/or services similar to those sought by this solicitation that the Respondent has provided to business or government entities. Fill out the text box or upload a document to the Vendor Attachments Section. ★	-	Text (Multi-Line)	[Edit] <input type="checkbox"/>
1.8	The Respondent shall provide references from three (3) previous customers or clients knowledgeable of the Respondent's performance in providing goods and/or services similar to the goods and/or services described in this solicitation. Enter a	-	Text (Multi-Line)	[Edit] <input type="checkbox"/>

◀ Previous Save Progress Next ▶



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**.

Questions Event Actions ▾ | History | ?

★ Response Is Required
🔒 Confidential Mode Enabled

On This Page **Add or Import ▾** Export Questions

- Add Question Page
- Add Question Group
- Add Block Questions With Vendor Profile Content
- Add from Library ▶
- Import from File ▶

Group 1: **Form of Proposal** Manage Group ▾ | Delete Selected Questions

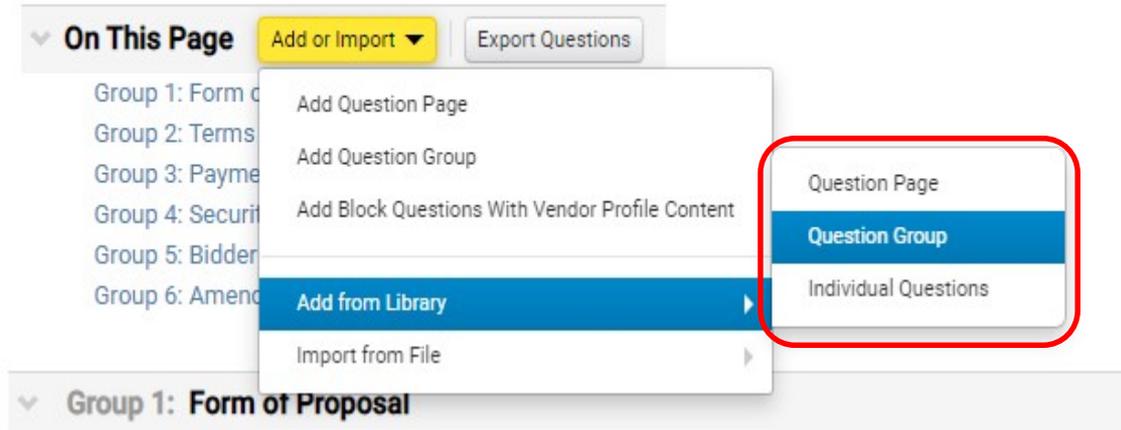
Instructions: Respondent is to complete the following questions. Fill out items with blanks. Indicate "yes" or "no" on items requesting agreement. If a "no" response is indicated, an exception must be noted on the "Exceptions Form".

#	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)	<input type="checkbox"/> <input type="checkbox"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	<input type="checkbox"/> <input type="checkbox"/>

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**.

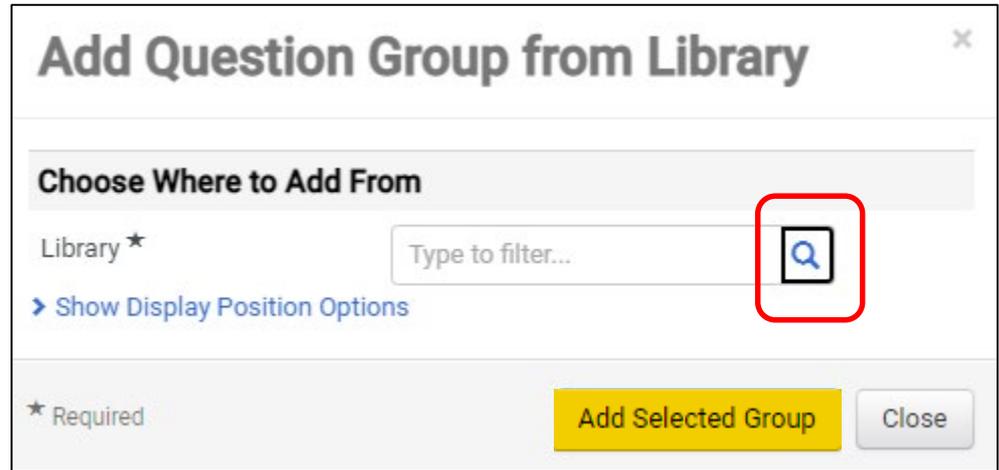
Questions



The screenshot displays the 'Questions' management interface. At the top, there is a section titled 'On This Page' with a yellow 'Add or Import' dropdown button and a grey 'Export Questions' button. Below this, a list of question groups is visible, including 'Group 1: Form of Proposal', 'Group 2: Terms', 'Group 3: Payment', 'Group 4: Security', 'Group 5: Bidder', and 'Group 6: Amendment'. The 'Add or Import' dropdown is open, showing options: 'Add Question Page', 'Add Question Group', 'Add Block Questions With Vendor Profile Content', 'Add from Library' (highlighted in blue), and 'Import from File'. A secondary menu is open over 'Add from Library', showing three options: 'Question Page', 'Question Group' (highlighted in blue), and 'Individual Questions'. A red rounded rectangle highlights this secondary menu.

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.



The screenshot shows a dialog box titled "Add Question Group from Library" with a close button (X) in the top right corner. Below the title bar is a section labeled "Choose Where to Add From". Under this section, there is a "Library" label with a star icon, followed by a text input field containing the placeholder text "Type to filter...". To the right of the input field is a search icon (magnifying glass) which is highlighted with a red rectangular box. Below the input field is a blue link that says "Show Display Position Options". At the bottom of the dialog, there is a "★ Required" label on the left, a yellow button labeled "Add Selected Group", and a grey button labeled "Close".

Question Group – Add Group from Library

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

Click the **Select** button.

Select Values ×

Name

Generic RFP	Select
-------------	--------

Selected Value

No Value Selected

Close

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.

The screenshot shows a dialog box titled "Add Question Group from Library" with a close button (X) in the top right corner. Below the title is a section labeled "Choose Where to Add From". This section contains three dropdown menus: "Library" (with a star icon and a search icon), "Question Page" (with a dropdown arrow), and "Question Group" (with a dropdown arrow). Below these is a link that says "> Show Display Position Options". At the bottom of the dialog, there is a "Required" field with a star icon, a yellow "Add Selected Group" button, and a grey "Close" button. Four red arrows with black outlines and numbers (#1, #2, #3, #4) point to the "Question Page" dropdown, the "Question Group" dropdown, the "Required" field, and the "Add Selected Group" button, respectively.

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 acknowledge the change, Certify and Resubmit 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	<input type="checkbox"/>	<input type="checkbox"/>

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.

Questions Event Actions ▾ | History | ?

▼ **On This Page** Add or Import ▾ Export Questions

- Group 1: Form of Proposal (15)
- Group 2: Terms and Conditions (14)
- Group 3: Payment Terms (6)
- [Group 4: Security \(1\)](#)
- Group 5: Bidder Conference (2)
- Group 6: Amendments (1)

▼ **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 a response. If a response is not indicated, an exception must be noted on the "Exceptions Form".

#	Question Text	Conditional Upon	
1.1	The Respondent shall enter contact name, telephone number, and email address for questions regarding this solicitation. ★	-	<input type="checkbox"/>

Manage Group ▾

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

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	<input type="checkbox"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line) Edit	<input type="checkbox"/>
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	<input type="checkbox"/>
1.4	Enter the number of years the Respondent has been in business in the text box. ★	-	Numeric Text Box Edit	<input type="checkbox"/>
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	<input type="checkbox"/>



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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.

Group 1: Form of Proposal

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)	<input type="checkbox"/> <input type="checkbox"/> <input type="button" value="Edit"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	<input type="checkbox"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
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)	<input type="checkbox"/> <input type="button" value="Edit"/>

Group 1: Form of Proposal

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)	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="Edit"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="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)	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="Edit"/>
1.4	Enter the number of years the Respondent has been in business in the text box. ★	-	Numeric Text Box	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="Edit"/>

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.

#	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)	<input type="checkbox"/>
1.2	The Respondent shall enter the State or Foreign Country of Residence. ★	-	Text (Single Line)	<input type="checkbox"/>

Edit Question

Question Text ★
The Respondent shall enter contact name, telephone number, and email address for questions regarding this solicitation. ★
881 characters remaining

Response Type ★
Text (Multi-Line) ▼

- Text (Single Line)
- Text (Multi-Line)
- Numeric Text Box
- Yes/No
- Dropdown List (Pick One)
- Multiple Choice (Pick One)
- Multiple Select (Pick Many)
- File Upload
- Date
- Proforma Contract

Attach File

Show Display Position Options

★ Required

Close

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 <input type="checkbox"/>
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	Edit Delete Create Conditional Follow Up

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).



Edit Question

Conditional Upon Confidential Treatment of Information - Is Respondent requesting confidential treatment of specific information?

Conditional Upon Value ***** Yes

Question Text *****
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.
440 characters remaining

Response Type ***** File Upload

Vendor Response Is Required
 Enable Confidential Mode
Limits bid price viewing to users allowed to view prices within the event. The event creator manages which users can see prices.

Attach File Form 22 - RFP Upload

[Show Display Position Options](#)

***** Required **Save Changes** Close

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.

Edit Question

Conditional Upon: Confidential Treatment of Information - Is Respondent requesting confidential treatment of specific information?

Conditional Upon Value: Yes

Question Text: 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.

440 characters remaining

Response Type: File Upload (selected)

- Text (Single Line)
- Text (Multi-Line)
- Numeric Text Box
- Yes/No
- Dropdown List (Pick One)
- Multiple Choice (Pick One)
- Multiple Select (Pick Many)
- File Upload
- Date
- Proforma Contract

Attach File

Show Display Position Options

Save Changes Close

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.

#	Question Text	Conditional Upon	Response Type	<input type="checkbox"/>
2.1	Respondent shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One) <input type="button" value="Edit"/>	<input type="checkbox"/>
2.2	Respondent shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One) <input type="button" value="Edit"/>	<input type="checkbox"/>
2.3	Respondent shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One) <input type="button" value="Edit"/>	<input type="checkbox"/>
2.4	Respondent shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One) <input type="button" value="Edit"/>	<input type="checkbox"/>
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) <input type="button" value="Edit"/>	<input type="checkbox"/>
2.6	Respondent shall read the Insurance Requirements and enter a response. (Issuing Officer add attachment) ★	-	Dropdown List (Pick One) <input type="button" value="Edit"/>	<input type="checkbox"/>
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) <input type="button" value="Edit"/>	<input type="checkbox"/>
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) <input type="button" value="Edit"/>	<input type="checkbox"/>
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) <input type="button" value="Edit"/>	<input type="checkbox"/>
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) <input type="button" value="Edit"/>	<input type="checkbox"/>
2.11	Service Terms and Conditions - The Contract(s) that the Agency expects to award as	-	Yes/No <input type="button" value="Edit"/>	<input type="checkbox"/>



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.

Edit Question

Question Text ★
Respondent shall read the Contract Terms & Conditions and enter a response.
925 characters remaining

Response Type ★
Dropdown List (Pick One) ▼

Response Options ★

Vendor Response Is Required
 Set Disqualifying Response

Response ★	Disqualify	
Enter response here	<input type="checkbox"/>	+ Add Response
Respondent accepts the Terms & Conditions	No	Remove
Respondent does NOT accept the Terms & Conditions	Yes	Remove
Respondent has Exceptions to the Terms & Conditions	No	Remove

Attach File
Contract Terms and Conditions - RFP Upload ▼

> Show Display Position Options

★ Required

Save Changes Close



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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”.

The screenshot displays the 'RFP Test' interface for event 005-RFP-0414-2023. The event status is 'Draft' and the type is 'Request for Proposal'. The 'Vendors' section is highlighted in the left sidebar. The main content area shows a table of vendors invited by commodity code. Two vendors are listed: SOI JAGGAERTEST and Wisecom Technology. The 'Vendors Invited by Commodity Code (2)' text and the vendor table are circled in red. A blue informational message states: 'Based on the event commodity code(s) selected for this event, the candidate vendors in your network are listed below. When the event is released/opened, all vendors with the event commodity code(s) and a valid email address will be invited to participate in this event.'

Vendor Name	Doing Business As	Sales and Corporate Contacts	Action
SOI JAGGAERTEST		Laura Shannon (Sales) laura.shannon@iowa.gov SOI JAGGAERTEST (Corporate) SOIJAGGAERTEST@gmail.com Add Contact	
Wisecom Technology	Wisecom Technologies Inc.	(Sales) Add Contact	

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**.

The screenshot shows a web interface titled "Vendors". At the top right, there are links for "Event Actions", "History", and a help icon. Below the title, there are three tabs: "Vendors Invited by Commodity Code (2)", "Additional Vendors (0)", and "Add Vendors to Event" (which is highlighted with a red box). To the right of these tabs is "Add Vendors From Group". Below the tabs is a "Manually Invite Vendors" dropdown menu. The main section is titled "Search Registered Vendors" and contains several search criteria: "Vendor" (text input), "Relationship" (dropdown menu set to "All"), "Vendor Contact" (text input), "Zip Code" (text input) with a "Within" dropdown set to "5 Miles", "Commodity Code" (text input with an "Edit" button), and "NAICS Code" (text input with a search icon). At the bottom right of the search section, there is a "Clear" link and a "Search" button (highlighted with a red box). At the bottom of the page, there are three buttons: "Previous", "Save Progress", and "Next".

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**

The screenshot displays the 'Vendors' management interface. At the top, there are navigation links for 'Event Actions' and 'History'. Below this, there are filters for 'Vendors Invited by Commodity Code (0)', 'Additional Vendors (0)', and buttons for 'Add Vendors to Event' and 'Add Vendors From Group'. A 'Manually Invite Vendors' dropdown menu is visible, with a red arrow pointing to it. Below the filters, there is a table of registered vendors. The table has columns for 'Vendor Name', 'Doing Business As', 'Sales and Corporate Contacts', and 'Action'. A red box highlights the first row, which is for 'BAKER MECHANICAL INC'. The 'Sales and Corporate Contacts' column for this vendor lists 'Daryld Karloff (Sales)' with the email 'karloffd@thebakergroup.com' and an 'Add Contact' button. The 'Action' column for this row has a red box around the 'Add to Event' button. Below the table, there is a 'Search Registered Vendors' section with various search criteria: 'Vendor' (text input), 'Relationship' (dropdown menu set to 'All'), 'Vendor Contact' (text input), 'Zip Code' (text input with a 'Within 5 Miles' dropdown), 'Commodity Code' (text input with an 'Edit' button), and 'NAICS Code' (text input with a search icon). A 'Search' button is at the bottom right of the search section.

Vendor Name	Doing Business As	Sales and Corporate Contacts	Action
BAKER MECHANICAL INC		Daryld Karloff (Sales) karloffd@thebakergroup.com Add Contact	Add 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.

Add Vendor to Event ✕

Vendor Name ★

Sales or Corporate Contact Name

Email ★

★ Required

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.

Introduction

Sourcing Events offer the ability to manually invite suppliers via the application or via import. The purpose of this page is to provide detailed instructions for how to import manually invited suppliers. This page will help you:

- Understand the format for importing manually invited suppliers
- Perform an import of manually invited suppliers

Key Features of Manually Invited Suppliers Import

- Manually Invited Suppliers Import allows you to import manually invited suppliers in "bulk".
- The project must be set to allow manually invited suppliers in order to perform the import.
- The import supports manually inviting suppliers which are not in the system. **This process will not add contacts to an existing supplier.**

Manually Invited Supplier Import Fields

Some key information regarding the import format:

- Not all fields in the template are required.
- It is recommended that you always download the current template file from your site prior to populating data. This ensures that you always have the most up-to-date import requirements.

The following table details the template on the "Import Data" tab of this spreadsheet and provides information regarding the fields available to import and the format required for import. Please note the following about the table below:

- Required fields are marked in with an asterisk (*) in the *Header Field Name* column.
- Field formatting requirements are detailed in the *Description* column. (If there is no specific format requirement information, then you may enter any alpha-numeric value).

Header Field Name	Description
Supplier Name*	This is the name of the supplier being invited.
	This is the name of the sales or

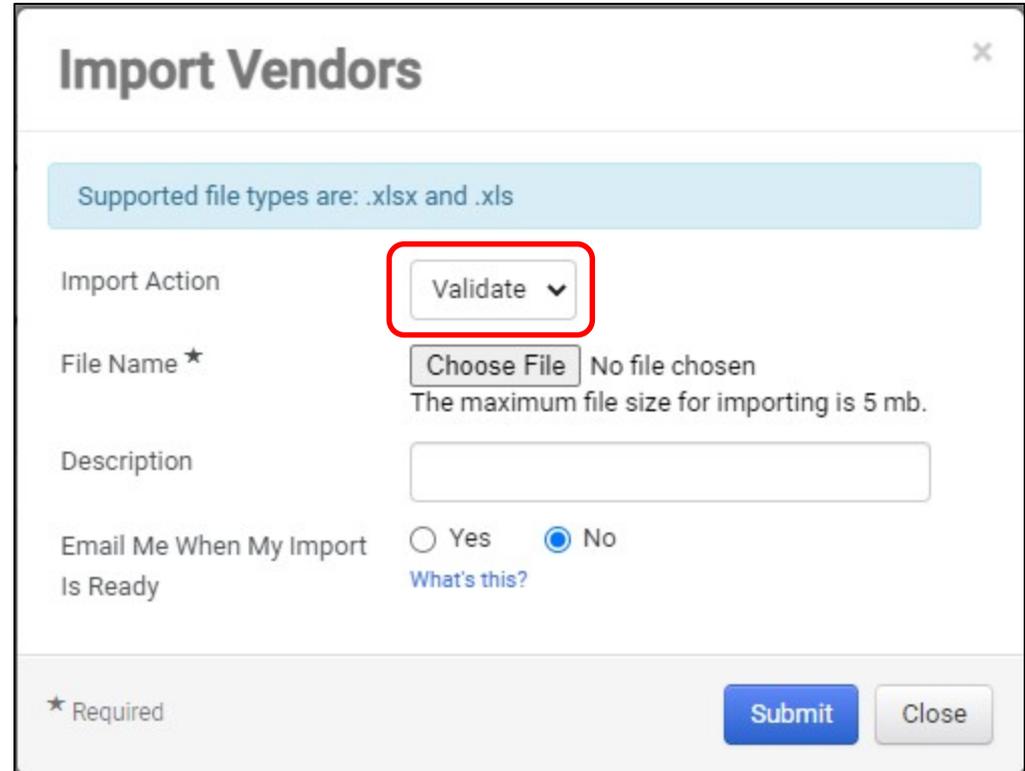
Instructions Import Data

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.



The screenshot shows a web form titled "Import Vendors" with a close button (X) in the top right corner. Below the title is a light blue banner that reads "Supported file types are: .xlsx and .xls". The form contains several fields:

- Import Action:** A dropdown menu with "Validate" selected and a downward arrow. This dropdown is highlighted with a red rectangular box.
- File Name ***: A "Choose File" button, the text "No file chosen", and a note "The maximum file size for importing is 5 mb."
- Description:** An empty text input field.
- Email Me When My Import Is Ready:** Radio buttons for "Yes" and "No", with "No" selected. A link "What's this?" is positioned below the "No" option.

At the bottom left, there is a legend: "★ Required". At the bottom right, there are two buttons: a blue "Submit" button and a grey "Close" button.

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.

The screenshot shows the 'Exports and Imports' section of the IMPACS system. On the left sidebar, the 'Tools' menu is expanded, and 'Exports and Imports' is highlighted with a red box. The main content area displays a table with the following data:

Type	Collateral	Description	Requested By	Requested At	Status	File
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Pending	

The 'Status' column for the 'Validate' row is highlighted with a red box and contains the text 'Pending'. A 'Refresh this Page' button is visible in the top right corner of the main content area.

The screenshot shows the 'Exports and Imports' section of the IMPACS system after a refresh. The 'Tools' menu on the left sidebar still has 'Exports and Imports' highlighted with a red box. The main content area displays a table with the following data:

Type	Collateral	Description	Requested By	Requested At	Status	File
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Completed	manuallyinviteSuppliersTemplate (4).xls

The 'Status' column for the 'Validate' row is highlighted with a red box and contains the text 'Completed'. The 'File' column contains a download link, also highlighted with a red box. A 'Refresh this Page' button is visible in the top right corner of the main content area.



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**.

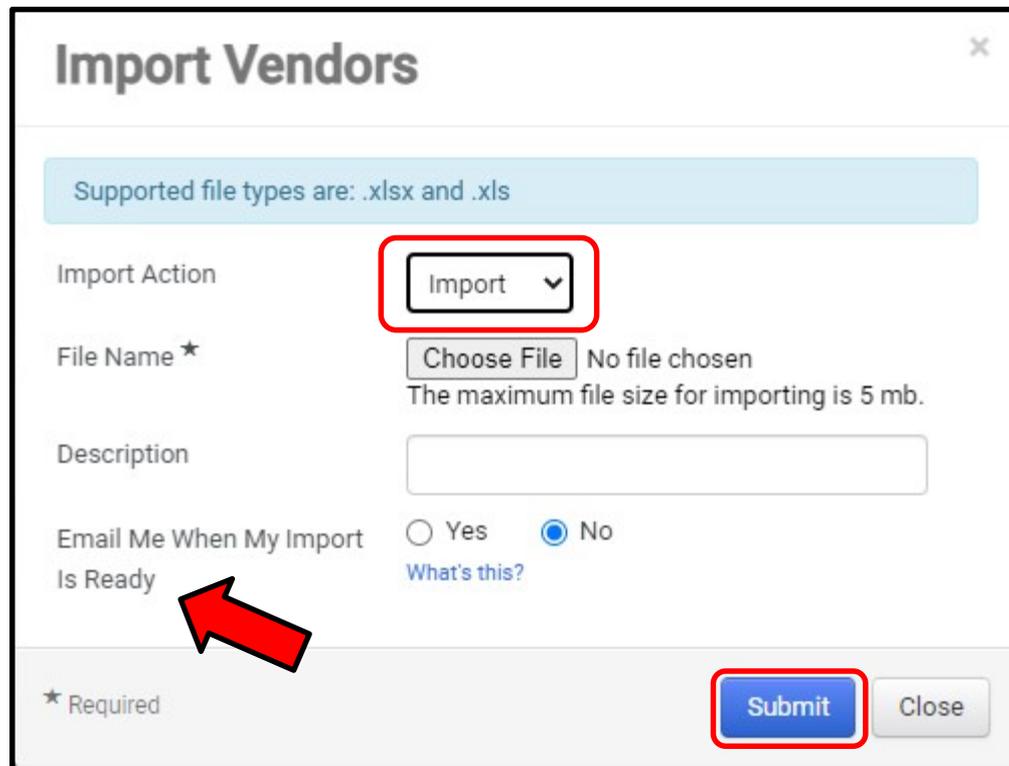
For **Import Action**, Select **Import**.

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**.



The screenshot shows a web form titled "Import Vendors" with a close button (X) in the top right corner. A light blue banner at the top states "Supported file types are: .xlsx and .xls". The form contains the following fields and controls:

- Import Action:** A dropdown menu with "Import" selected, highlighted by a red box.
- File Name ***: A "Choose File" button, the text "No file chosen", and a note "The maximum file size for importing is 5 mb."
- Description:** An empty text input field.
- Email Me When My Import Is Ready:** Radio buttons for "Yes" and "No" (selected), with a "What's this?" link below.
- Footer:** A "Submit" button (highlighted with a red box) and a "Close" button. A red arrow points to the "Email Me When My Import Is Ready" label.

A legend at the bottom left indicates that an asterisk (*) denotes a required field.

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**.

The screenshot shows a web interface titled "Vendors". At the top right, there are links for "Event Actions", "History", and a help icon. Below the title, there are two tabs: "Vendors Invited by Commodity Code (0)" and "Additional Vendors (1)". The "Additional Vendors (1)" tab is selected and highlighted with a red box. Below the tabs, there is a section titled "1 Event Vendors". This section contains a table with the following columns: "Vendor Name", "Doing Business As", "Sales and Corporate Contacts", and "Action". The table has one row with the following data:

Vendor Name	Doing Business As	Sales and Corporate Contacts	Action
SOIJAGGAERTEST		Laura Shannon (Sales) SOIJAGGAERTEST@gmail.com Add Contact	Remove

At the bottom of the interface, there are three buttons: "Previous", "Save Progress", and "Next". The "Save Progress" button is highlighted with a red box.





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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.



Section	Progress	Action Needed on the Following
Setup	Incomplete	Q&A Submission Close Date Open Date Close Date
Users	✓ Required Fields Complete	
Description	✓ Required Fields Complete	
Prerequisites	3 No Required Data	
Buyer Attachments	8 No Required Data	
Vendor Attachments	✓ No Required Data	
Questions	39 No Required Data	
Items	0 No Required Data	
Vendors	2 Required Data Provided	

Section	Progress
Setup	✓ Required Fields Complete
Users	✓ Required Fields Complete
Description	✓ Required Fields Complete
Prerequisites	3 No Required Data
Buyer Attachments	8 No Required Data
Vendor Attachments	✓ No Required Data
Questions	39 No Required Data
Items	0 No Required Data
Vendors	2 Required Data Provided