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IMPACS (Jaggaer) RFB

Step-by-Step Guide for RFB:
Evaluations, Questions and Answer Board, Contract
Creation from Sourced Event and Creating a PO from
a Sourced Event.

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Vendor Responses

Before RFB Close

Vendor Responses

Vendor Responses on the left side of the screen is where the Buyer will find the Bidder's responses for the event. Before the RFB closes, you may find that the Bidders are in various stages of responding to the event.

If the RFB is about to close and the Buyer notices that a Bidder has a **Response in Progress** and that completion is **100%**, then it is likely the Bidder intends to submit a bid but failed to **Review, Certify and Submit**.

The screenshot displays the 'Vendor Responses' interface. On the left, a sidebar contains navigation options: 'Request for', 'Under Evaluation', 'Settings and Content', 'Vendor Responses', and 'Tools'. The main content area shows a table titled '2 Invited Vendors'. The table has columns for 'Progress', 'Response % Complete', 'Vendor Name', 'Required Items Total Bid', and 'Optional Items Total Bid'. Two rows are visible: one for 'SOIJAGGAERTEST' with a 'Response In Progress' status and '100%' completion, and another for 'Laura Shannon' with an 'Event Not Viewed' status. A 'Save Progress' button is located at the bottom right of the table.

Progress	Response % Complete	Vendor Name	Required Items Total Bid	Optional Items Total Bid
Response In Progress	100%	SOIJAGGAERTEST	-	-
Event Not Viewed	-	Laura Shannon	-	-

Vendor Responses

A completed Event submission has a green Submitted tag under Progress and is 100% complete.

Vendor Responses		
Evaluation Actions ▾		
7 Invited Vendors		
1-7 of 7 Results		
Progress ▲	Response % Complete ▲	Vendor Name ▲
Submitted	100%	Integrated Aqua Systems, Inc. ⓘ
Submitted	100%	Oceans Design Inc ⓘ
Intend To Bid	7%	Innovasea Systems, Inc. ⓘ
Intention Not Declared	0%	Integrated Marketing Systems ⓘ
Intention Not Declared	0%	North America Procurement Council ⓘ
Event Not Viewed	-	Integrated Aqua Systems, Inc. ⓘ
Event Not Viewed	-	OPN Architects, Inc. ⓘ
1-7 of 7 Results		



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Tools

Questions and Answers Board

Question & Answer Board

Once the RFQ is open, the Bidders may have questions. When the Bidder posts a question(s) to IMPACS, the Buyer will be notified by email and will be able to navigate to the Tools menu tab and select Q&A Board.

This event is **Open**, and will be closed on 1/19/2023 12:00 AM CST. You may view responses on 1/19/2023 12:00 AM CST. Workflow Actions ▾

RFB Approval Test
005-RFB-0270-2023

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

Settings and Content >

Vendor Responses >

Tools ▾ 

Internal Notes

Exports and Imports

Q & A Board

Approvals

Award Notifications

Question & Answer Board

Event Actions ▾ History ?

Monitor and respond to submitted Solicitation questions. Ask questions and monitor responses to those questions.

Submit Question ▾

Unanswered Questions (0) Public Q&A (0) Questions from Vendors (0) Questions sent to Vendors (0)

Vendor Go Sort by Date Asked: Most Recent First ▾

All questions have been answered.



Question & Answer Board

The question will appear on the Q&A Board.

The Buyer may answer the question by selecting the **Answer Question** button.

Question & Answer Board Event Actions ▾ History ?

Monitor and respond to submitted Solicitation questions. Ask questions and monitor responses to those questions.

Submit Question ▾

Unanswered Questions (1) Public Q&A (0) **Questions from Vendors (1)** Questions sent to Vendors (0)

Vendor Go Sort by Date Asked: Most Recent First ▾

Timeframe

Can the Bid be extended? Asked 12/28/2022 at 11:35 AM by Laura Shannon SOJAGGAERTEST

No answer yet.

Answer Question ▾

Question & Answer Board – Answer Question

The Buyer enters the answer in the **Answer** text box. If the Buyer does not want the Bidder to respond to the answer then check the **Vendor Response Disabled** box. If the answer requires an attachment, it may be uploaded under the Attachment field.

Most Answers will post to **Public Q&A**.

When done select **Post Answer**.

The screenshot shows a web interface for answering a question. At the top, the title "Answer Question" is displayed with a close button (X). Below the title is a section for "Timeframe" with a dropdown arrow and the question "Can the Bid be extended?". The question was asked on 12/28/2022 at 11:35 AM by Laura Shannon (SOIJAGGAERTEST). The main section is titled "Enter Answer Below" and contains an "Answer" field with a star icon, a text input box, and a "5000 characters remaining" indicator. Below the answer field is a checkbox labeled "Vendor Response Disabled" which is checked. The "Attachment" section features a "Select file" button and the text "Drop file to attach, or browse.". The "Post to Public Q&A?" section has radio buttons for "Yes" (selected) and "No". At the bottom, there is a "Post Answer" button and a "Close" button. Red boxes highlight the answer text box, the "Vendor Response Disabled" checkbox, the attachment field, and the "Post Answer" button.

Question & Answer Board – Answer Question

Once the answer is posted, the Buyer may:

Edit the answer,

Make this Q&A Private, or

Post a Question Like This.

Question & Answer Board Event Actions ▾ History ?

Monitor and respond to submitted Solicitation questions. Ask questions and monitor responses to those questions.

Submit Question ▾

Unanswered Questions (0) **Public Q&A (1)** Questions from Vendors (0) Questions sent to Vendors (0)

Vendor Go Sort by Date Asked: Most Recent First ▾

Timeframe

Can the Bid be extended? Asked 12/28/2022 at 11:35 AM by Laura Shannon **SOIJAGGAERTEST**

Answer
DAS does not wish to extend the RFB. Answered 12/28/2022 at 11:49 AM by Laura Shannon **(My Answer)**

Actions ▾

- Edit this Q&A Entry
- Make this Q&A Private
- Post a Question Like This



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Evaluation

Award Actions

Evaluation

From the **Vendor Response** screen, select **View Response**. This is a quick way to **VIEW (not evaluate)** the responses from individual Bidders.

The Buyer may select to Disqualify the Bidder from this dropdown menu or ask the Bidder a question.

The screenshot displays the 'Vendor Responses' interface. At the top right, there are links for 'Event Actions' and 'History'. Below this, there are buttons for 'Evaluation Actions' and 'Load Saved Scenario'. The main section is titled '1 Invited Vendors' and includes a link to 'Evaluate Selected Responses'. A table lists the vendor details:

Progress	Response % Complete	Vendor Name	Required Items Total Bid	Optional Items Total Bid	
Submitted	100%	SOJAGGAERTEST	50,000.00 USD	640.00 USD (1 of 1)	<input type="checkbox"/>

A dropdown menu is open for the 'View Response' button, showing options: 'View Response', 'Disqualify', and 'Ask a Question'. A 'Save Progress' button is located at the bottom right.

Evaluation

To Evaluate the responses, check the boxes next to the responsive Bidders and select **Evaluate Selected Responses**.

Vendor Responses Event Actions ▾ History ?

Evaluation Actions ▾ Load Saved Scenario

1 Invited Vendors Evaluate Selected Responses

Progress ▲	Response % Complete ▲	Vendor Name ▲	Required Items Total Bid ▲	Optional Items Total Bid ▲	
Submitted	100%	SOIJAGGAERTEST i	50,000.00 USD	640.00 USD (1 of 1)	<input type="checkbox"/> <input type="checkbox"/>

View Response ▾
View Response
Disqualify
Ask a Question

Save Progress

Evaluation

Under the **Scenario Navigator** tab, the Buyer will see a bid tabulation. If there are multiple Bidders, then they will be listed horizontally in columns.

Each row can be expanded to see the Bidder responses for all the information asked for in the RFB.

Award Scenario for I

View Scenario ▾ Save As... Reset Export ▾

Scenario Navigator Scenario Breakdown Scenario Savings

Sort Bids by: Total Bid ▾ Ascending ▾ Show Vendor Response Notes Expand All Collapse All

Scenario Award Actions ▾ **SOIJAGGAERTEST** ▾ Bidder

Response Notes	<input type="text"/> 1000 characters remaining
Auto Score	0
▸ Total Adjusted Bid	50,640.00 USD
<input type="checkbox"/> ▸ Total Bid	50,640.00 USD
▸ Product Line Items - Adjusted Bid	50,000.00 USD
<input type="checkbox"/> ▸ Product Line Items	50,000.00 USD
▸ Service Line Items - Adjusted Bid	640.00 USD
<input type="checkbox"/> ▸ Service Line Items	640.00 USD
▸ Questions	



Evaluation

There are two ways to Award to a Bidder. The first is:

From the **Scenario Award Actions** dropdown menu, the Buyer may **Award** to the Bidder, or choose **No Award**.

Be sure to check the boxes that you are awarding.

Award Scenario for

View Scenario ▾ Save As... Reset Export ▾

Scenario Navigator Scenario Breakdown Scenario Savings

Sort Bids by: Total Bid ▾ Ascending ▾ Show Vendor Response Notes Expand All Collapse All

Scenario Award Actions ▾ **SOIJAGGAERTEST** ▾

Award To SOIJAGGAERTEST
No Award

1000 characters remaining

Auto Score 0

> Total Adjusted Bid	50,640.00 USD
<input type="checkbox"/> > Total Bid	50,640.00 USD
> Product Line Items - Adjusted Bid	50,000.00 USD
<input type="checkbox"/> > Product Line Items	50,000.00 USD
> Service Line Items - Adjusted Bid	640.00 USD
<input type="checkbox"/> > Service Line Items	640.00 USD
> Questions	

Evaluation – Using Scenario

Another option to Award is from the **View Scenario** Menu. There are pre-loaded Scenarios to choose from. From the **View Scenario** dropdown menu, the Buyer may:

Load their own Saved Scenario or;

Award to a single Bidder with the lowest price or;

Award to a single Bidder with the lowest adjusted price.

Award Scenario for

View Scenario ▾ Save As... Reset Export ▾

Load Saved Scenario

- Single Award -
Lowest Bid Price

Lowest Adjusted Bid Price

Best Auto Score

- Split Award -
Lowest Bid Price

Scenario Award Actions ▾

SOIJAGGAERTEST ▾

Response Notes	<input type="text"/>
	1000 characters remaining
Auto Score	0
▸ Total Adjusted Bid	50,640.00 USD
<input type="checkbox"/> ▸ Total Bid	50,640.00 USD
▸ Product Line Items - Adjusted Bid	50,000.00 USD
<input type="checkbox"/> ▸ Product Line Items	50,000.00 USD
▸ Service Line Items - Adjusted Bid	640.00 USD
<input type="checkbox"/> ▸ Service Line Items	640.00 USD
▸ Questions	

Evaluation – Using Scenarios

When the Buyer selects a pre-loaded Scenario (in this case - single bidder – lowest price) then a popup screen asks the Buyer to create their own Scenario for future use.

The Buyer names their scenario and selects Save and Finalize.

Save a New Scenario ✕

Scenario Name ★

Scenario Notes

1000 characters remaining

★ Required

Evaluation – Using Scenarios

Once the Buyer initiates an Award, then the **Pending Award** tag appears under the awarded Bidder's name.

Select **Finalize Award**.

The screenshot displays the 'Award Scenario for' interface. At the top, there is a navigation bar with buttons for 'View Scenario', 'Save As...', 'Reset', 'Export', and 'Finalize Award'. The 'Finalize Award' button is highlighted with a red box. Below this, there are tabs for 'Scenario Navigator', 'Scenario Breakdown', and 'Scenario Savings'. The 'Scenario Navigator' tab is active. Underneath, there are dropdown menus for 'Sort Bids by:' (set to 'Total Bid') and 'Ascending', along with a checked checkbox for 'Show Vendor Response Notes'. In the main content area, there is a section for 'Scenario Award Actions' and 'Awarded Scenario'. The 'Awarded Scenario' section shows a dropdown menu with 'SOIJAGGAERTEST' selected, and a green 'Pending Award' tag is visible next to it, also highlighted with a red box. Below this, there is a 'Response Notes' section with a text area and a '1000 characters remaining' indicator.

Evaluation – Using Scenarios

Once the Award has been Finalized the banner will indicate **Finalized**.

The Buyer may also **Remove Finalized Award** and pick a different Award Scenario.

DO NOT SUBMIT FOR APPROVAL at this time.

The five day appeal period now begins. The solicitation will stay in **Under Evaluation** status until the appeal period has ended. See next slides for NOIA.

The screenshot displays a procurement system interface. At the top, a light blue banner shows the status "Under Evaluation" and the message "The response(s) from SOIJAGGAERTEST is Pending Award." Below this, a red-bordered box highlights the "Award Scenario 'Single Bidder Award - Lowest Price' for Test 17011" with a "Finalized" button next to it. A red arrow points down to the banner area. Below the highlighted box, there are buttons for "Load Saved Scenario", "Export", "Finalize Award", and "Remove Finalized Award". A second red arrow points to the "Finalize Award" button. Further down, there are tabs for "Scenario Navigator", "Scenario Breakdown", and "Scenario Savings". At the bottom, there are dropdown menus for "Sort Bids by:" (set to "Total Bid") and "Ascending", and a checked checkbox for "Show Vendor". In the bottom right corner, there is a section for "Awarded Scenario" for "SOIJAGGAERTEST" with a green "Pending Award" button.



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Award Notifications

Award Notifications

See **Tools>Award Notifications>Public Site Award Attachments** to post your Notice of Intent to Award (NOIA). A template for the NOIA can be found in the Award Notifications Email section **or see next slides**. If using the IMPACS template, copy the language and replace the placeholders.

Add NOIA Attachment and Bid Tab – then select **Publish**.

You may email the awarded and participating vendors at this time from *your* email account.

The system Award Notifications should not be used. The system generated emails will not be active until the vendor is awarded, therefore the system emails will not be available until after the appeal period.

System generated NOIA emails – DO NOT USE

Award Notifications

Email Template Location

Event Actions History ?

Type	Status	Message	
Awarded Vendor Email	Pending	Default	Preview And Send ▼
Participating Vendor Email	Not Sent ⓘ	Default	Preview Email ▼
Award Comment	Pending		Preview and Publish

Public Site Award Attachments

Add Attachment

No attachments have been added.



Award Notifications

Awarded Vendor Email Template

Date

Solicitation Number and Title: XXX-RFB-XXXX-20XX; Solicitation Name

The following vendors submitted responses to the above solicitation:

Participating Vendors

Responses were evaluated according to the criteria stated in the solicitation. The State of Iowa – (Agency Name) announces the intent to award to:

Awarded Vendor Name

We would like to thank each vendor for your time and efforts in preparing a response to this solicitation.

This Notice of Intent to Award is subject to execution of the written contract and, as a result, this notice does NOT constitute the formation of a contract between the State of Iowa and the successful respondent. If the apparent successful respondent fails to negotiate and deliver an executed contract, the State, at its sole discretion, may cancel the notice of intent to award and award the contract to the next ranked respondent or withdraw the solicitation. The State of Iowa reserves the right to cancel the award at any time prior to the execution of the written contract.

Please see the Solicitation Administrative Terms for more information.

Awarded Vendor Name shall complete their vendor registration in the IMPACS Vendor Portal - (<https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=DASlowa>) and include additional information that includes: TIN, additional contacts, additional addresses (including fulfillment address) and order distribution information including the email address where the Purchase Order will be sent.

See attached scoring summary. If there are any other questions or comments, please direct all communications to the Issuing Officer/Purchasing Agent listed on the solicitation.

We appreciate your interest in doing business with the State of Iowa (Agency Name).



Award Notifications

Participating Vendor Email Template

Date

Solicitation Number and Title: XXX-RFB-XXXX-20XX; Solicitation Name

The following vendors submitted responses to the above solicitation:

Participating Vendors

Responses were evaluated according to the criteria stated in the solicitation. The State of Iowa – (Agency Name) announces the intent to award to:

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We invite you to contact the Issuing Officer if you would like additional information or have any questions about the evaluation process. A Respondent whose proposal or bid has been timely filed and who is aggrieved by the award of the department may appeal the decision by filing a written notice of appeal (in accordance with 11—Chapter 117.20, Iowa Administrative Code) to: The Director of the Department of Administrative Services, Hoover State Office Building, Des Moines, Iowa 50319-0104 and a copy to the Issuing Officer. The notice must be filed within five days of the date of the Intent to Award notice issued by the Department, exclusive of Saturdays, Sundays, and legal state holidays. The notice of appeal must clearly and fully identify all issues being contested. A notice of appeal may not stay negotiations with the apparent successful Vendor.

See attached scoring summary. If there are any other questions or comments, please direct all communications to the Issuing Officer/Purchasing Agent listed on the solicitation.

We appreciate your interest in doing business with the State of Iowa (Agency Name).



Approvals

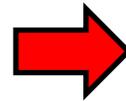
After the appeal period has ended, navigate to **Workflow Actions** and select **Approve**. The Pending Award Vendor is now Awarded.

If the Buyer has an Approver, then the Buyer shall notify the Buyer's Approver that they can now approve. The Approver shall navigate to the Approval tab in the wizard. They can Approve from their Dashboard or open the solicitation. If opening the solicitation:

Open the **Approvals** tab in the Tools Wizard and navigate to the **Solicitation Evaluation Workflow** tab.

If the Buyer is the Approver, then click the **Expedite** button for **Award To Supplier**.

The Finish step will disappear after you navigate off the page.



Workflow Actions ▾

- Approve
- Assign To Myself
- Create New Quick Quote Stage
- Create New Stage
- Add Ad-Hoc Step

This event is **Under Evaluation**. You may view responses. The response from **SOJAGGARTEST** is Pending Award. You may view the [scenario breakdown](#).

RFB Test 17011
005-RFB-0255-2023

Type: **Request for Bids**
Event Status: **Under Evaluation**

Settings and Content >

Vendor Responses >

Tools ▾

- Internal Notes
- Exports and Imports
- O & A Board
- Approvals**
- Award Notifications

Approvals

Solicitation Approval Workflow | **Solicitation Evaluation Workflow**

Show skipped steps

Orientation: Horizontal ▾

Submitted 11/27/2022 3:15 PM

Buyer Evaluation (Active) | Award To Supplier (Future) | Finish

Laura Shannon (View approvers)

Expedite (under Award To Supplier)

Expedite (under Finish)



Award

Once the Bidder has been awarded through the approval process, you will see in several places the **Awarded** tag.

If the Buyer wants to create a Contract from this Sourcing Event, please see the Initiate Contract from Sourced Event section in the Approval process.

The screenshot displays a procurement system interface. At the top, a blue banner contains a red-bordered box with the text "Awarded" and "This event has been awarded to SOIJAGGAERTEST." Below this, the "Award Scenario for" section shows a "Load Saved Scenario" button and an "Export" dropdown. The "Scenario Navigator" includes "Scenario Breakdown" and "Scenario Savings" tabs. The "Sort Bids by:" section is set to "Total Bid" and "Ascending", with a checked "Show Vendor Response Notes" option and "Expand All" / "Collapse All" links. The "Awarded Scenario" section features a red-bordered box with "SOIJAGGAERTEST" and an "Awarded" tag. Below this is a "Response Notes" text area with a "1000 characters remaining" indicator and an "Auto Score" of 0. A message states: "You may view the [scenario breakdown](#). This event is **Awarded**. You may view responses." A "Workflow Actions" dropdown is also present. The "RFB Test010" section (ID: 005-RFB-0254-2023) shows "Type: Request for Bids" and "Event Status: Awarded". The "Vendor Responses" section includes "Evaluation Actions" and "Load Saved Scenario" buttons. A table titled "1 Invited Vendors" is shown with the following data:

Progress	Response % Complete	Vendor Name	Required Items Total Bid	Optional Items Total Bid	
Awarded	100%	SOIJAGGAERTEST	50,000.00 USD	640.00 USD (1 of 1)	<input type="checkbox"/>

Additional elements include "Settings and Content" links, "Vendor Responses" and "Vendor Responses" dropdowns, "Auto Score", "Cost Analysis", "Eval. Calculation Options", "Tools", and a "Save Progress" button at the bottom right.





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Export and Publish

Export and Publish

Under the **Tools/Award Notifications:**

Export the RFB documents from the **Event Actions** dropdown menu.

Publish the Event Document to the Public Site by clicking on the **Add Attachment** button.

The screenshot displays the 'Award Notifications' interface. At the top right, there is a dropdown menu labeled 'Event Actions' (highlighted with a red box) and a 'History' link. The dropdown menu is open, showing options: 'Copy', 'Copy As Template', 'Export Event as PDF' (highlighted with a red box), 'Hide Event Prices', and 'Initiate Procurement Process'. Below the dropdown is a 'Preview and Publish' button. The main content is a table with three columns: 'Type', 'Status', and 'Message'. The table contains three rows: 'Awarded Vendor Email' (Pending), 'Participating Vendor Email' (Not Sent), and 'Award Comment' (Pending). Below the table is a section titled 'Public Site Award Attachments' (highlighted with a red box), which includes an 'Add Attachment' button and the text 'No attachments have been added.'

Type	Status	Message
Awarded Vendor Email	Pending	Default
Participating Vendor Email	Not Sent	Default
Award Comment	Pending	

Public Site Award Attachments

[Add Attachment](#)

No attachments have been added.



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Initiate Contract

Create a Contract from a Sourcing Event

Step-by-Step Contract Creation from Sourcing Event

RFB 17 TEST07
005-RFB-0249-2023

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

Settings and Content >

Vendor Responses ▾

Vendor Responses

Tools >

Vendor Responses

Event Actions ▾ History | ?

Evaluation Actions ▾ Load Saved Scenario

1 Invited Vendors Evaluate Selected Responses

Progress ▲	Response % Complete ▲	Vendor Name ▲	Total Bid ▲	
Awarded	100%	SOIJAGGAERTEST <i>i</i>	38,050.00 USD	<input type="checkbox"/>
			<input type="button" value="View Response"/>	<input type="checkbox"/>

Return to your Sourcing Event and navigate to **Vendor Responses** then to **Evaluate Selected Responses**.

From the Award Scenario Page, Select Scenario Breakdown

Award Scenario for RFB Test 020

Load Saved Scenario Export ▾ Remove Finalized Award

Scenario Navigator **Scenario Breakdown** Scenario Savings



Step-by-Step Contract Creation from Sourcing Event

The **Create Contract** link appears.

Note: The Create Contract link is only available after the vendor has been awarded and if you have the appropriate permissions to create a contract.

Click the **Create Contract** hyperlink on the right side of the screen.

The **Create Contract wizard** opens – See next slide.

Awarded This event has been awarded to **SOJAGGAERTEST**. Workflow Actions ▾

Award Scenario for RFB 17 TEST007 History | 📄 | ?

Load Saved Scenario | Export ▾

Scenario Navigator | **Scenario Breakdown** | Scenario Savings

Awarded Total: 38,050.00

▼ **SOJAGGAERTEST** Response Notes: Choosing Alt. Vendor Total: 38,050.00 [Create Contract](#)

	Item Description	Catalog Number	Quantity	Target Price	Unit Price	
P1.1.ALT.1 Alt product ALT	Alt item one View Details		10	-	3,805.00	



Step-by-Step Contract Creation from Sourcing Event

Complete these fields:

Contract Name – The name of the Sourcing Event automatically populates the field by default. Change the name of the contract if needed.

Contract Type – Select a contract type. Use the Search icon to find the correct Contract Type.
The Contract Type **cannot be changed once selected.**

The image shows two screenshots from a web application. The top screenshot is titled "Create Contract" and shows the "About the Contract" step (Step 1 of 2). It features two input fields: "Contract Name" with the value "RFB 17 TEST007" and "Contract Type" with a search icon and the placeholder text "Type to filter...". A red box highlights both fields. Below them is a "Required" label and a "Next" button. A red arrow points from the "Contract Type" field to the bottom screenshot. The bottom screenshot is titled "Contract Types" and shows a search bar with a magnifying glass icon. Below the search bar are two radio button options: "Master Agreement - Standard - Test" and "Master Agreement COOP - Test". A red box highlights these two options. Below the options is a "Selected Value" field containing the text "No Value Selected". At the bottom right are "Save Changes" and "Close" buttons.

Step-by-Step Contract Creation from Sourcing Event

Complete these fields:

Department – The name of the Agency that is issuing the Contract. Use the **Search** icon.

Main Document Template – Select the Contract template that is for your Agency.

Click **Next**.

Create Contract

About the Contract (Step 1 of 2)

Contract Name ★ RFB 17 TEST007

Contract Type ★ Master Agreement - Standard - Test

Use Contract Template Yes No

Contract Template ★ Master Agreement - Standard Test

Department ★ Administrative Services State of Iowa

★ Required

Next ▶

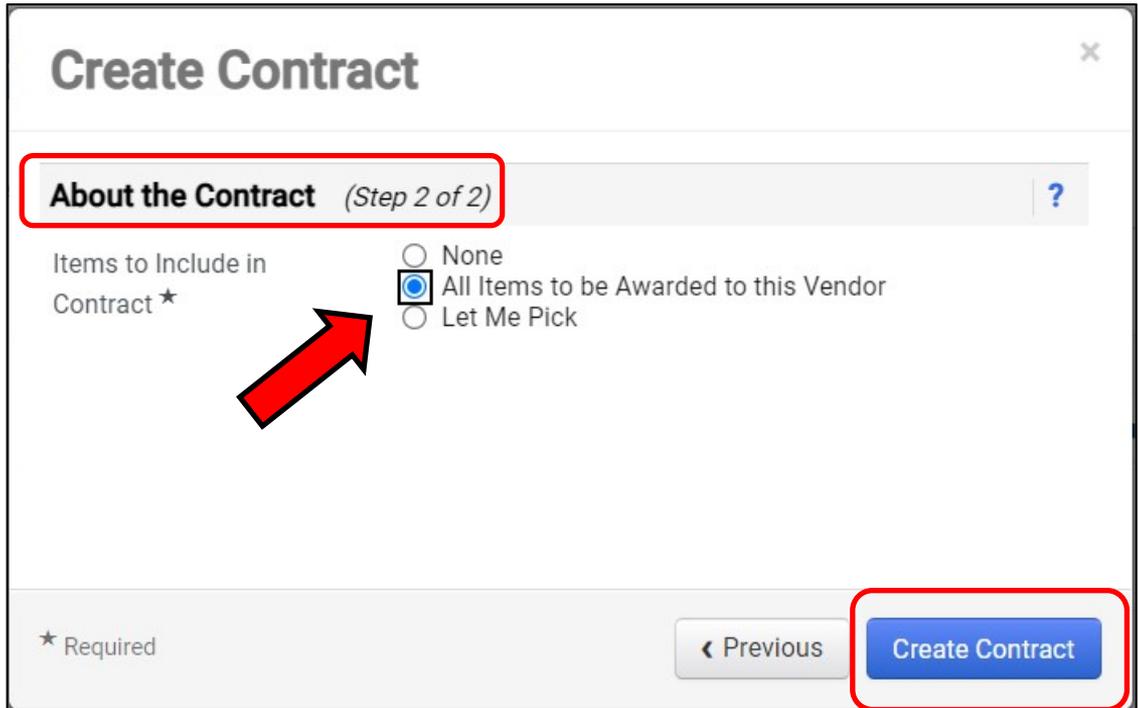


Step-by-Step Contract Creation from Sourcing Event

The **About the Contract** window opens.

Select the Items to be included in this Contract by clicking on the appropriate radio button.

Click **Create Contract**.



The screenshot shows a web interface for creating a contract. The title is "Create Contract" with a close button (X) in the top right. Below the title is a breadcrumb-style header "About the Contract (Step 2 of 2)" with a help icon (question mark) on the right. The main content area is titled "Items to Include in Contract ★" and contains three radio button options: "None", "All Items to be Awarded to this Vendor" (which is selected), and "Let Me Pick". A red arrow points to the selected radio button. At the bottom left, there is a "★ Required" label. At the bottom right, there are two buttons: "Previous" and "Create Contract", with the "Create Contract" button highlighted by a red box.

Step-by-Step Contract Creation from Sourcing Event

The Buyer is returned to the Evaluation Page and a new **Contract Number & Status** field appears.

Clicking on the contract number hyperlink will take you to the Contract Summary Page. From there you may open the Contract for editing.

Please see the IMPACS Contract Step-by-Step Guide for further information.

Awarded This event has been awarded to SOIJAGGAERTEST. Workflow Actions ▾

Award Scenario for RFB 17 TEST007 History | 📄 | ?

Load Saved Scenario | Export ▾

Scenario Navigator | Scenario Breakdown | Scenario Savings

Awarded Total: 38,050.00

▼ **SOIJAGGAERTEST** Response Notes: Choosing Alt. Vendor Total: 38,050.00 [Create Contract](#)

	Item Description	Catalog Number	Quantity	Target Price	Unit Price	Contract Number & Status
P1.1.ALT.1 Alt product ALT	Alt item one View Details		10	-	3,805.00	0121-2023 Draft





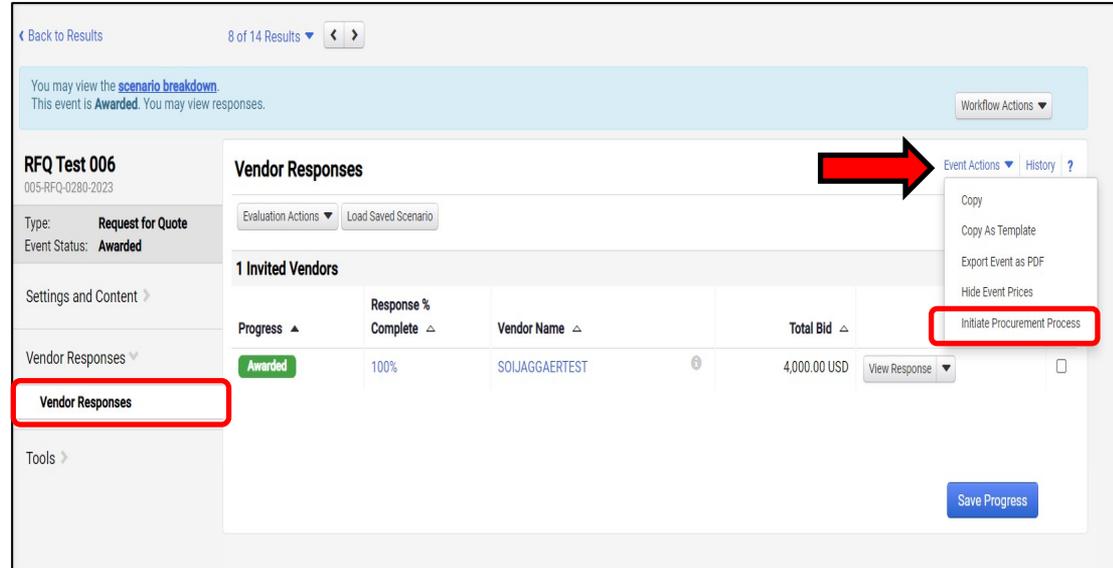
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Initiate Procurement Process

Initiate Procurement Process

To create a purchase requisition from the RFB, navigate to Vendor Responses Wizard and click on the **Event Actions** dropdown menu and select **Initiate Procurement Process**.



The screenshot displays the 'Vendor Responses' section for 'RFQ Test 006' (005-RFQ-0280-2023). The event status is 'Awarded'. The interface includes a 'Vendor Responses' sidebar menu, a main table of invited vendors, and an 'Event Actions' dropdown menu. A red arrow points to the 'Event Actions' dropdown, and a red box highlights the 'Initiate Procurement Process' option within the menu.

Progress	Response % Complete	Vendor Name	Total Bid
Awarded	100%	SOJAGGAERTEST	4,000.00 USD

Event Actions dropdown menu options:

- Copy
- Copy As Template
- Export Event as PDF
- Hide Event Prices
- Initiate Procurement Process

Initiate Procurement Process

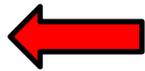
The Confirm Procurement Request Popup appears. Verify that your name is correct.

When done select **Continue**.

Confirm Procurement Request ✕

Create Shopping Cart from Awarded Event.

Prepared by/for User ★ Change User

Shannon, Laura 

★ Required Continue Close



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Create a Purchase Requisition

Purchase Requisition (PR)

Navigate to the **Shop Dashboard**- it might be called **Home Dashboard** on your screen

Dashboards • Shop Dashboard - LS



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

Shop

Simple Advanced

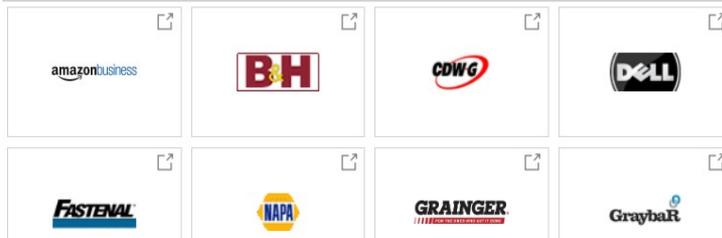
Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | [Service Item](#) | [Quick Order](#) Browse: [Vendors](#) | [Categories](#) | [Contracts](#)

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



Showcases

PunchOut Catalogs



My Draft Carts

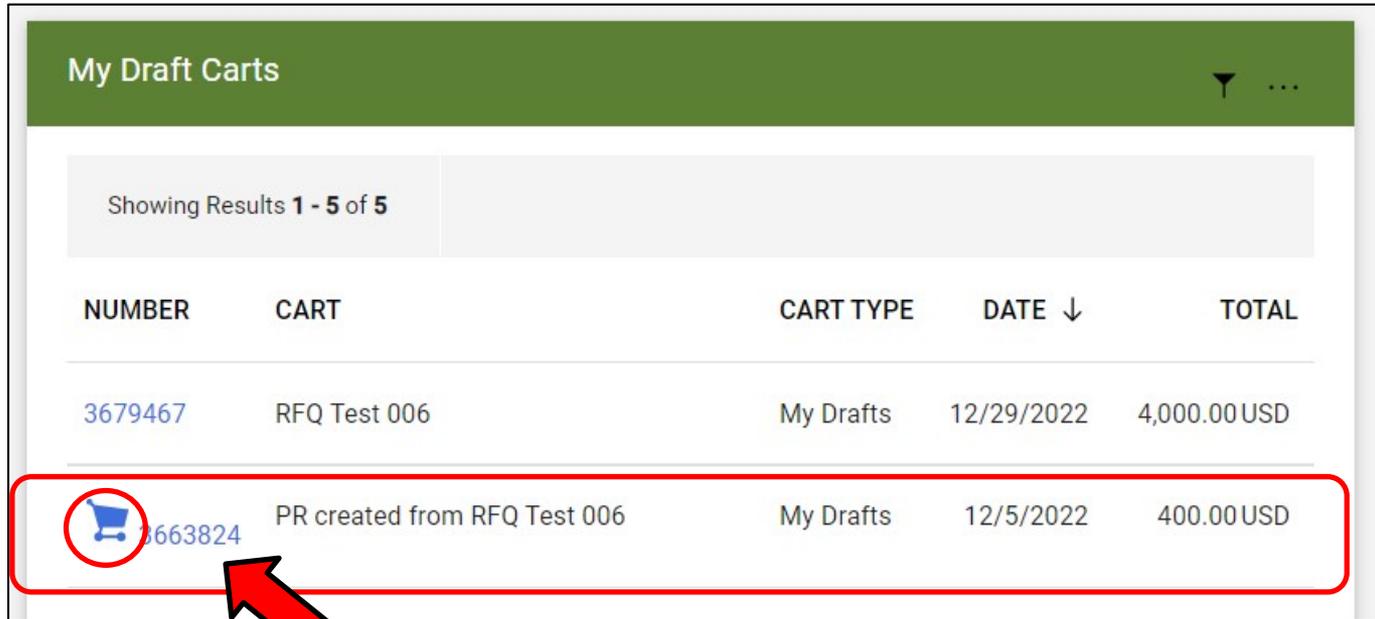
Showing Results 1 - 5 of 5

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3679467	RFQ Test 006	My Drafts	12/29/2022	4,000.00USD
3663824	PR created from RFQ Test 006	My Drafts	12/5/2022	400.00USD
3647507	2022-11-08 laura.shannon@iowa.gov 01	My Drafts	11/8/2022	19,456.64USD



Purchase Requisition (PR)

Navigate to **My Draft Carts** and select the **PR created from your RFQ**. It will have a shopping cart icon next to it. Click on the number hyperlink.



NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3679467	RFQ Test 006	My Drafts	12/29/2022	4,000.00 USD
 3663824	PR created from RFQ Test 006	My Drafts	12/5/2022	400.00 USD

Purchase Requisition (PR)

Check that the information is correct on the PR lines.

Check if the Commodity Code is correct.

Enter a name for the Purchase Requisition.

Select Proceed to Checkout.

Shopping Cart • 3663824

Assign Cart **Proceed To Checkout**

Simple Advanced

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

10 Items

SOIJAGGAERTEST • 10 Items • 400.00 USD

VENDOR DETAILS

Phone No. +1 515-330-7325

Fax No.

E-mail SOIJAGGAERTEST@gmail.com

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Crates	unknown	10/EA	40.00	Qty: 10 EA	400.00

ITEM DETAILS

Commodity Code 10011

Details

For Laura Shannon

Name PR created from RFQ Test 006

Total (400.00 USD)

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

Total: 400.00

Purchase Requisition (PR)

Check that the Addresses and Accounting Codes are correct. Edit by selecting the pencil icon.

Requisition • 3663824

Summary PO Preview Comments 1 Attachments History

General  ...

Cart Name PR created from RFQ Test 006

Description *no value*

Priority Normal

Prepared by Laura Shannon

Prepared for Laura Shannon

Department Department of Administrative Services (005)

Shipping  ...

Ship To

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

Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date *no value*

Billing  ...

Bill To

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

Billing Options

Accounting Date *no value*

Accounting Codes  ...

Department	Fund	Appropriation	Unit
005 Department of Administrative Services	<i>no value</i>	<i>no value</i>	<i>no value</i>

Internal Notes and Attachments  ...

Internal Note *no value*

Internal Attachments [Add](#)

External Notes and Attachments  ...

Note to all Vendors *no value*

Attachments for all vendors [Add](#)

PO Clauses [1 Edit | View details](#)

10 Items ...

SOIJAGGAERTEST • 10 Items • 400.00 USD ...

Draft

Total (400.00 USD)

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

Subtotal 400.00

400.00

What's next for my order?

Next Step Department Approval

Approvers Meyer, Allen
Pulley, Bobbi
Wendt, Karl

Workflow

Show skipped steps

Draft
Active
Laura Shannon

Department Approval
Future ...

Create PO
Future ...

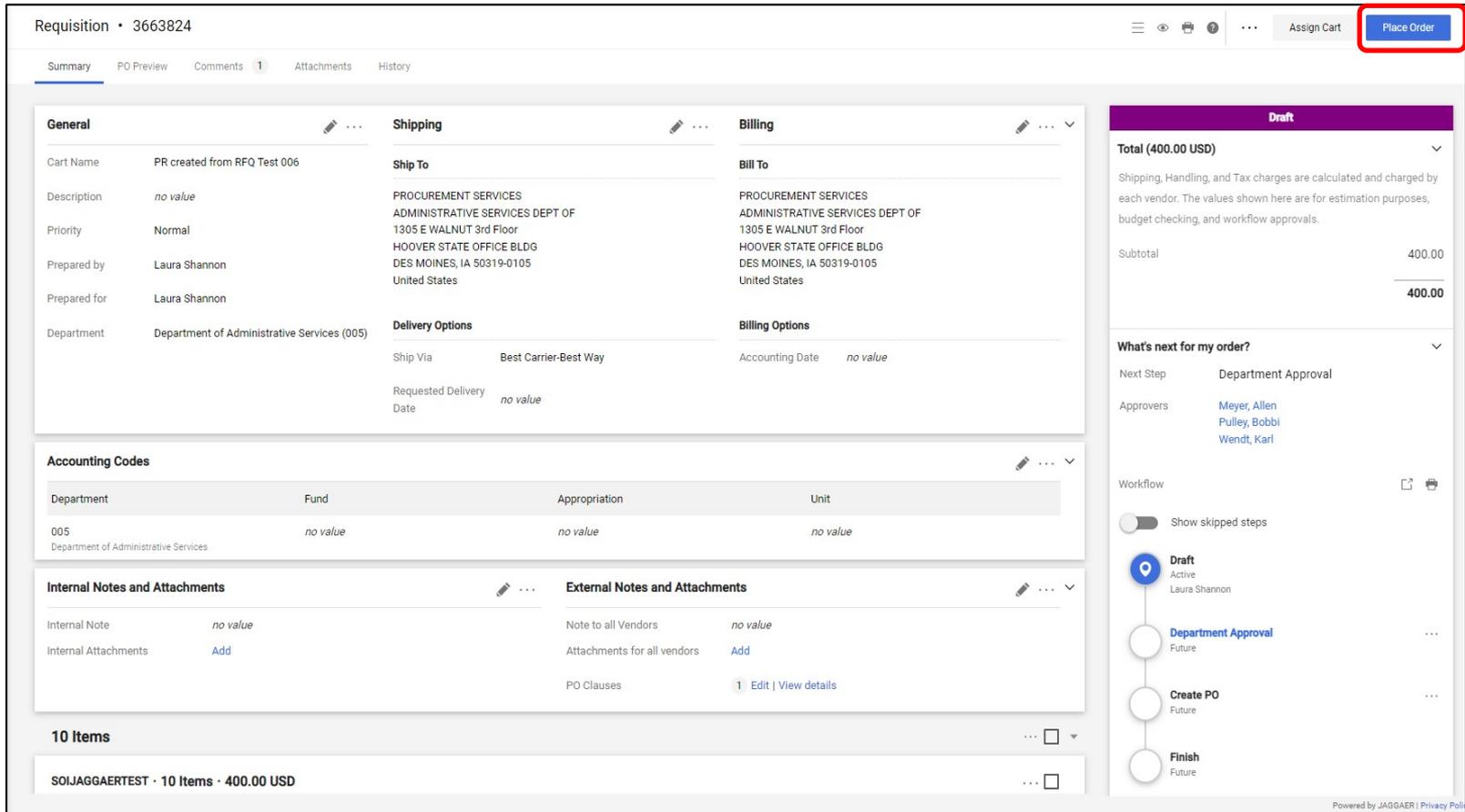
Finish
Future

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Purchase Requisition (PR)

Once all the information is correct, select **Place Order**.



Requisition • 3663824

Summary PO Preview Comments 1 Attachments History

General **Shipping** **Billing**

Cart Name PR created from RFQ Test 006

Description *no value*

Priority Normal

Prepared by Laura Shannon

Prepared for Laura Shannon

Department Department of Administrative Services (005)

Ship To

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

Bill To

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

Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date *no value*

Billing Options

Accounting Date *no value*

Accounting Codes

Department	Fund	Appropriation	Unit
005 Department of Administrative Services	<i>no value</i>	<i>no value</i>	<i>no value</i>

Internal Notes and Attachments **External Notes and Attachments**

Internal Note *no value*

Internal Attachments [Add](#)

Note to all Vendors *no value*

Attachments for all vendors [Add](#)

PO Clauses [1 Edit | View details](#)

10 Items

SOIJAGGAERTEST • 10 Items • 400.00 USD

Draft

Total (400.00 USD)

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

Subtotal 400.00

400.00

What's next for my order?

Next Step Department Approval

Approvers [Meyer, Allen](#)
[Pulley, Bobbi](#)
[Wendt, Karl](#)

Workflow

Show skipped steps

Draft
Active
Laura Shannon

Department Approval
Future

Create PO
Future

Finish
Future

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Purchase Requisition (PR)

The Purchase Requisition is then sent to your Approver(s) for approval. Once they approve the PR becomes a Purchase Order and is sent to the Vendor email address.

Draft

Total (400.00 USD) ▼

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

Subtotal	400.00
	<hr/>
	400.00

What's next for my order? ▼

Next Step Department Approval

Approvers [Meyer, Allen](#)
[Pulley, Bobbi](#)
[Wendt, Karl](#)

Workflow 📄 🖨️

Show skipped steps

- Draft**
Active
Laura Shannon
- Department Approval** ...
Future
- Create PO** ...
Future
- Finish**
Future

Purchase Requisition (PR)

The Purchase Requisition is then sent to your Approver(s) for approval. Once they approve the PR becomes a Purchase Order and is sent to the Vendor email address.

Simple Advanced Go to: [Non-Catalog Item](#) | [Service Item](#) | [Favorites](#) | [Forms](#) | [Shop](#) | [Quick Order](#) Browse: [Vendors](#) | [Categories](#) | [Contracts](#)

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

✓ Requisition 3663824 Submitted

Summary		Options	
Requisition number	3663824	Print	
Requisition status	Pending	Recent orders	
Cart name	PR created from RFQ Test 006	Return to your home page	
Requisition date	12/30/2022		
Requisition total	400.00 USD		
Number of line items	1		

Purchase Requisition (PR)

The Buyer may check on the status of the Purchase Requisition or Purchase Order by searching under the Orders Menu. Once the PO is generated, download it and enter it in I/3. Invoicing is still handled through I/3.

The screenshot displays the 'Orders Management of Procurement and Contracts System' interface. On the left, a dark sidebar contains navigation icons for Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Sourcing, Reporting, Administer, and Setup. The 'Orders' menu item is highlighted with a red box. A dropdown menu is open from 'Orders', also highlighted with a red box, showing options: Quick search, All Orders, Requisitions, Purchase Orders, Change Requests, Procurement Requests, and Invoices. The main content area shows a search bar with 'Simple' and 'Advanced' filters, and a list of items including one with '63824 Submitted' in a green bar.



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Questions?

Contact:

Laura Shannon

515-330-7325

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