



**Department of
Administrative Services**

*Empowering People
Collaboration
Customer Service*

IMPACS (Jaggaer) RFQ

Step-by-Step Guide for Request for Quote

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RFQ Rules

An RFQ is an informal competitive process for goods or services under \$50,000. Though an individual may have the appropriate certification level, upon request DAS-Central Procurement is available to create and issue the solicitation. See the [DAS Central Procurement Policy and Procedures Manual](#) for more details.

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

The Request for Quotes process includes the following steps:

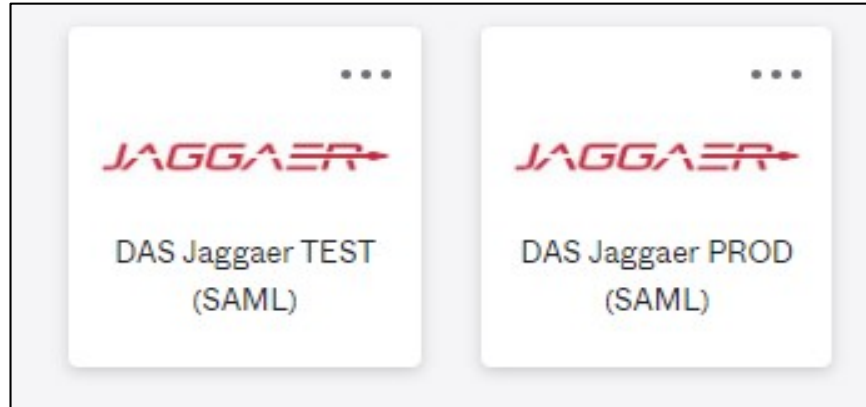
1. Posting the Request for Quote – first on the TSB website, then in IMPACS.
2. Receiving and tabulating respondents' quotes.
3. Awarding to the lowest responsible respondent.
4. Issuing Notice of Intent to Award.
5. Negotiating with the respondent (if any negotiation is needed).
6. Creating the Purchase Order.

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



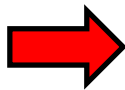
Best practice: Create an RFQ in the IMPACS (Jaggaer)test environment before posting in the Production (PROD) live site.

Left Menu Descriptions



The screenshot displays the JAGSAR (Iowa Management of Procurement and Contracts System) interface. The left sidebar menu is visible, with a red arrow pointing to the 'Menu Search' field at the bottom. The main content area shows the 'Shop Dashboard - LS' with a search bar and a table of 'My 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

The screenshot displays the iMPC system interface. On the left is a dark sidebar menu with icons for Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Sourcing, Reporting, Administer, and Setup. A red arrow points from the left towards the Sourcing menu item. The main content area is titled 'Dashboards • Solicitations Dashboard - LS'. Below this, there's a 'My Events' section with a blue header. It shows 'Total Solicitations: 25' and a table of events. The table has columns for 'Event Number', 'Event Status', and 'Event Title'. One event is visible with ID '005-RFB-0159-2022' and status 'Draft'. A second red arrow points to the 'Sourcing' menu item in the sidebar, which is expanded to show sub-menus: Solicitations, Approvals, Templates and Libraries, Reports, Requests, and Sourcing Administration. A third red arrow points to the 'Create New Event...' option within the 'Solicitations' sub-menu.

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

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

Create Solicitation

Create Solicitation [Close]

About the Solicitation (Step 1 of 2) [Help]

Event Title *

Department *

* Required

Create Solicitation [Close]

Departments [Close]

State of Iowa

Selected Value

* Required

1. Enter the **Title** of the RFQ.
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 RFQ.

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

Departments

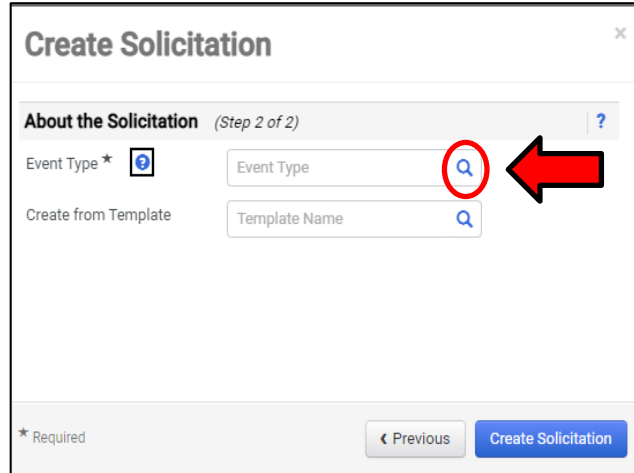
Search:

- 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:




About the Solicitation



Create Solicitation ×

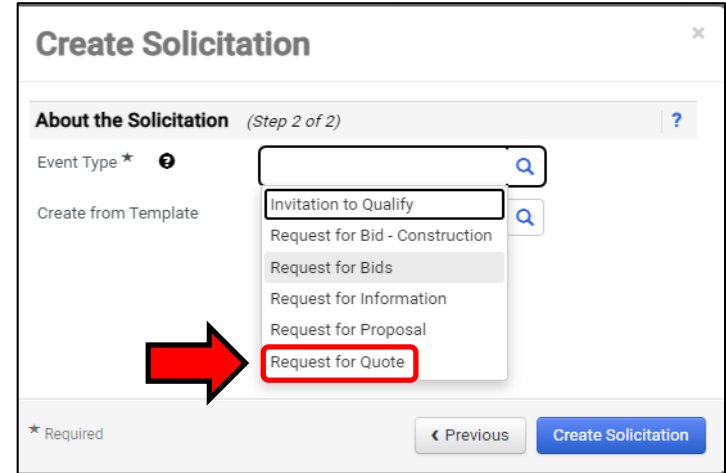
About the Solicitation *(Step 2 of 2)* ?

Event Type * ⓘ 🔍 

Create from Template 🔍

* Required ◀ Previous Create Solicitation

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



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

Select **Request for Quote** from the drop-down menu.

Create from Template

Create Solicitation [x]

About the Solicitation (Step 2 of 2) [?]

Event Type * [🔍] [Event Type] [🔍]

Create from Template [Template Name] [🔍] **#1**

[* Required] [Previous] **Create Solicitation** **#3**

Solicitation Templates [x]

[Search]

Name	
Generic RFP	[Select]
RFB for All Agencies - Goods and/or Services	[Select]
RFB for DAS - CP Goods and/or Services	[Select]
RFQ - Goods and/or Services	[Select] #2

Selected Value
No Value Selected

[Close]

1. Click on the **Search** icon to select from the RFQ templates available.
2. Select **RFQ – Goods and/or Services**. Click **Select** to load the **Template**.
3. Click on **Create Solicitation**.

Settings and Content

Following the wizard on the left-hand side of the screen, IMPACS will walk the Buyer through setting up the RFQ.

RFQ Test
005-RFQ-0278-2023

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

Settings and Content ▾

- Setup ▲
- Users ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0
- Review and Submit ▲

Tools >

Setup Event Actions ▾ History ?

Event Title * RFQ Test

Event Type ⓘ Request for Quote

Department Administrative Services

Event Number * 005-RFQ-0278-2023 ✎

Stage Title

Commodity Codes

Reporting Commodity Code - Edit

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes

Payment

Currency US Dollar

Estimated Value USD

Payment Terms

Bid and Evaluation

Respond by Proxy ⓘ Yes No

Use Evaluation Committee ⓘ Yes No

Auto Score Yes No

Cost Analysis ⓘ Yes No

★ Required

Save Progress Next >



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Setup Wizard

Setup

1. Name the RFQ
2. (Optional) change the RFQ 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 RFQ.

The screenshot shows the 'Setup' page for an RFQ Test. The page is titled 'RFQ Test' with the ID '005-RFQ-0278-2023'. The event status is 'Draft'. The 'Setup' section includes the following fields:

- Event Title: RFQ Test (indicated by red arrow #1)
- Event Type: Request for Quote
- Department: Administrative Services
- Event Number: 005-RFQ-0278-2023 (indicated by red arrow #2)
- Stage Title: (indicated by red arrow #3)

The 'Commodity Codes' section includes:

- Reporting Commodity Code: - (indicated by red arrow #4)
- Additional Commodity Codes: -

The 'Payment' section includes:

- Currency: US Dollar
- Estimated Value: (input field)
- Payment Terms: (dropdown menu)

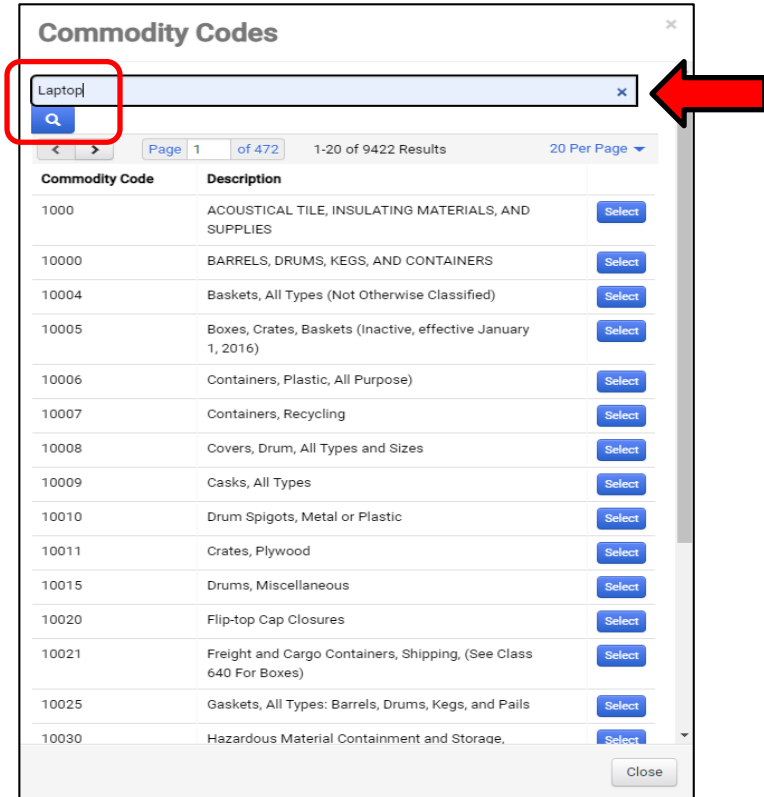
The 'Bid and Evaluation' section includes:

- Respond by Proxy: No (selected)
- Use Evaluation Committee: No (selected)
- Auto Score: No (selected)
- Cost Analysis: No (selected)

At the bottom right, there are buttons for '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 appear when “Laptop” is entered in the search box.

Select the Commodity Code that best fits your RFQ.

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

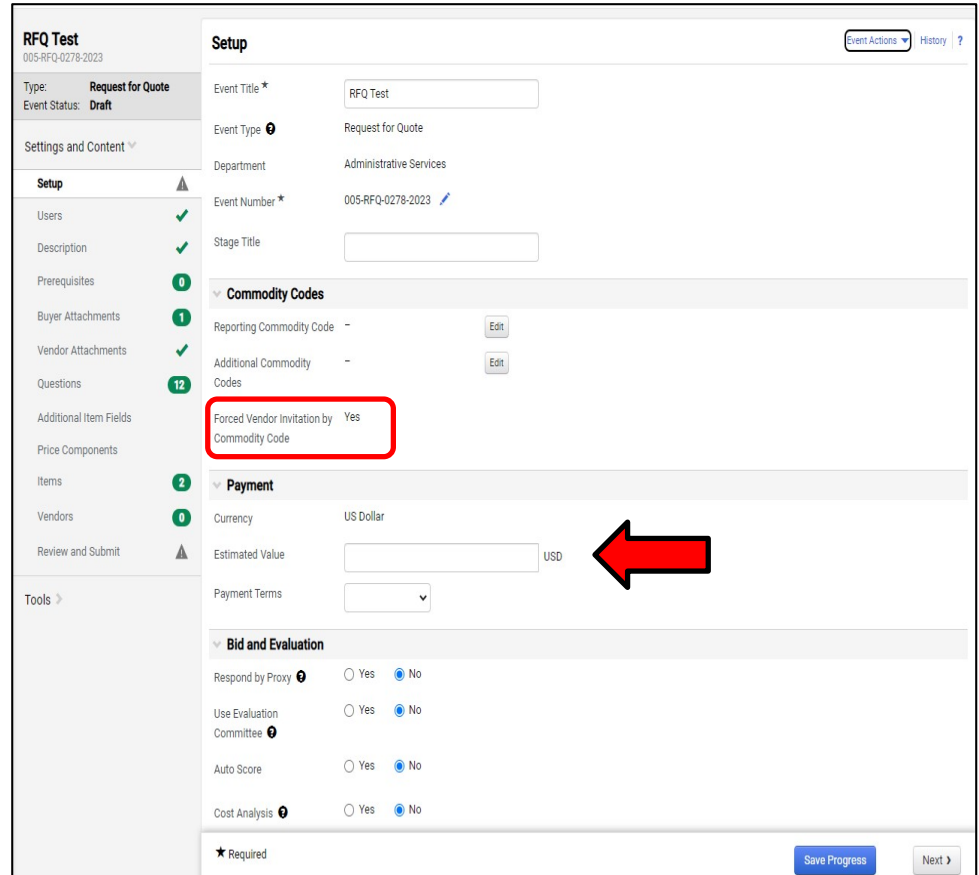
Commodity Code	Description	
20454	*Microcomputers, Laptop, Notebook and Tablets	Select
20554	*Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products	Select
5567	Mounting Hardware: Laptops, GPS, Cameras, Electronic Devices, etc. Automotive.	Select
98424	Computers, Microcomputer,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

Setup – Commodity Codes & Payment

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

The default **Currency** is **US Dollar**.

Please estimate the value of the RFQ.



The screenshot displays the 'RFQ Test' setup page. The left sidebar shows a navigation menu with sections like 'Setup', 'Users', 'Description', 'Prerequisites', 'Buyer Attachments', 'Vendor Attachments', 'Questions', 'Additional Item Fields', 'Price Components', 'Items', 'Vendors', and 'Review and Submit'. The main content area is titled 'Setup' and contains the following fields and sections:

- Event Title ***: RFQ Test
- Event Type**: Request for Quote
- Department**: Administrative Services
- Event Number ***: 005-RFQ-0278-2023
- Stage Title**: [Empty field]
- Commodity Codes**
 - Reporting Commodity Code**: - [Edit]
 - Additional Commodity Codes**: - [Edit]
 - Forced Vendor Invitation by Commodity Code**: Yes (highlighted with a red box)
- Payment**
 - Currency**: US Dollar
 - Estimated Value**: [Empty field] USD (indicated by a red arrow)
 - Payment Terms**: [Dropdown menu]
- Bid and Evaluation**
 - Respond by Proxy**: Yes No
 - Use Evaluation Committee**: Yes No
 - Auto Score**: Yes No
 - Cost Analysis**: Yes No

At the bottom right, there are buttons for 'Save Progress' and 'Next >'. A red arrow points to the 'USD' label next to the 'Estimated Value' field.

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.

1. If the Buyer wants the Bidder to offer **Alternate Items** in their bid, then select the **Yes** radio button.
2. Include a brief description of the Goods and/or Services you seek.

▼ 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 checked="" type="radio"/> Yes <input 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	<input type="text"/> 200 characters remaining
Restrict Buyer Notifications	Yes



Setup - Dates

Select the date the RFQ will be open to the public. Please make sure it is at least 48 hours after posting the RFQ 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


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**. **Optional** - clicking 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 offer 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 contains the following elements:

- 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 clock icon. A red arrow labeled '#1' points to it.
- Close Date *:** A date input field with a calendar icon and a clock icon. A red arrow labeled '#2' points to it.
- 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 clock icon. A red arrow labeled '#3' points to it.
- Bottom:** A '★ Required' label, a blue 'Save Progress' button with a red arrow labeled '#4' pointing to it, and a 'Next >' button.



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Users Wizard

Add & Edit Users

Users

The Buyer may add Users for access to the RFQ.

1. **Event Owners** may be individual **Users** or **Users** with various **Roles** (typically the Department Approvers for your Agency. You may add additional **Users** here.
2. **Contacts** for the RFQ may be added here. They must be an IMPACS User.
3. **Stakeholders** are **Users** 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.

RFQ Test
005-RFQ-0278-2023

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

Settings and Content ▾

- Setup
- Users** ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0
- Review and Submit ⚠

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 **#1**

Shannon, Laura

Event Managers on this Department have full control over this event.

Role: Admin (4 users)
Role: Procurement (0 users)

Contacts * Contact information for these users is shown to vendors: Edit Users **#2**

Shannon, Laura

Stakeholders Stakeholders can view the event and responses: Edit Users **#3**

No User Selected

Notification Recipients * Only Notification Recipients will be eligible to receive system-generated event notifications. Edit Users **#4**

Shannon, Laura

★ Required

◀ Previous Save Progress Next ▶

Users – User Search

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

The **Event Creator** and the additional **User** 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 User(s) have been selected.

User Search

Search Box [] More Options

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

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

No Values Selected

Save Changes Close

Users – Save Progress or Next

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



RFQ Test

005-RFQ-0278-2023

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

Settings and Content ▾

- Setup ▲
- Users** ✓
- Description ✓
- Prerequisites 0
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- 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 (0 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.



RFQ Test
005-RFQ-0278-2023

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

Settings and Content ▾

- Setup ▲
- Users ✓
- Description ✓**
- Prerequisites 0
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0
- Review and Submit ▲

Tools >

Description

Event Actions ▾ History ?

Copy from Library

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

Format (inherited font) (inherited size) B I U **ABC** A ▾ [Icons]

X, X² [Icons]

Buyer must edit or delete the highlighted text below

The purpose of this Request for Quote (RFQ) is to solicit quotes from qualified providers to provide the goods and/or services described further in this RFQ to the Lead Agency and any Participating Agencies.

This RFQ is designed to provide Bidders with the information necessary for the preparation of competitive Quotes. The RFQ process is for the Lead Agency's and Participating Agencies' benefit and is intended to provide the Lead Agency with competitive information to assist in the selection process. It is not intended to be comprehensive. Each Bidder is responsible for determining all factors necessary for the submission of a comprehensive Quote.

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

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

NOTE: Bidder must approve and resubmit their quote after an amendment has been posted by the Issuing Officer. If the quote was submitted before the amendment, all information will be saved. The Bidder 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 quote again (if previously submitted).

Insert Background Information

Description of Goods or Services

Sales History, Agencies/Facilities that use, Other information

★ Required

< Previous Save Progress Next >



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Prerequisites

Add, Edit & Delete

Prerequisites

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

1. The Bidder will see a pop-up of the language when they click on the hyperlink.
2. You may add **Prerequisites** from the Library, create your own or leave this section blank by deleting the Prerequisite using the **Actions** dropdown menu.

The screenshot shows the 'Prerequisites' section of a software interface. At the top left, there is a blue button labeled 'Add Prerequisite' with a downward arrow, which is pointed to by a large red arrow. To the right of this button is a red circle. Below the 'Add Prerequisite' button is a table with two columns: 'Instructions to vendor' and 'Prerequisite Content'. The first row contains the text 'Bidder shall read and make certifications of the their Bid.' and a link 'Certification of Bid'. The second row contains the text 'Bidder shall read and authorize to release information for their Bid. ★' and a link 'Authorization to Release Information'. To the right of the table, there are two 'Actions' dropdown menus, each enclosed in a red box. At the top right of the interface, there are links for 'Event Actions', 'History', and a question mark. At the bottom right, there are buttons for 'Previous', 'Save Progress', and 'Next'.



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Buyer Attachments

Location for Purchasing Agent/Issuing Officer Attachments to
the Bidder

Buyer Attachments

You may **Add Attachments** here for the Bidder to download.

After adding the attachment you may **Edit, Download, Upload New Version** (the old version will be retained for reference), or **Delete**.

Note the Exceptions Form is no longer used.

RFQ Test 006
005-RFQ-0280-2023

Type: Request for Quote
Event Status: Awarded
Created Document: 3679467

Settings and Content

- Setup ✓
- Users ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 1**
- Vendor Attachments ✓
- Questions 3
- Additional Item Fields
- Price Components
- Items 1
- Vendors 1

Vendor Responses >

Tools >

Buyer Attachments Event Actions History ?

Attachment	Version	Size	Added By	Modified Date	Actions
Exceptions Form RFQ.docx	1	17 KB	Laura Shannon	12/29/2022 10:34:57 AM	Actions

< Previous Next >

Buyer Attachments Event Actions History ?

Add Attachment

Attachment	Version	Size	Added By	Modified Date	Actions
Exceptions Form RFB.docx	1	21 KB	Laura Shannon	12/5/2022 9:03:13 AM	Actions

- Edit Properties
- Download
- Upload New Version
- Delete



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Vendor Attachments

Vendor Attachments

Vendor Attachments is where the Bidder will upload any attachments the Buyer asked the Vendor (Bidder) to provide or any attachments the Bidder feels are relevant to the Quote.

The screenshot displays the IMPCS interface for RFQ Test 006 (005-RFQ-0280-2023). The event status is 'Awarded'. The 'Vendor Attachments' section is highlighted with a red box, indicating that vendors are able to upload attachments with their bid response. The 'Settings and Content' section shows various configuration items with status indicators (checkmarks or numbers).

Settings and Content	Status
Setup	✓
Users	✓
Description	✓
Prerequisites	2
Buyer Attachments	1
Vendor Attachments	✓
Questions	8
Additional Item Fields	
Price Components	
Items	1
Vendors	1



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Questions Section

Overview

Questions Section

The **Questions Section** is where the Bidder is asked 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 Bidder 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.

RFQ Test
005-RFQ-0278-2023

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

Settings and Content ▾

- Setup ▲
- Users ✓
- Description ✓
- Prerequisites 2
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12**
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0
- Review and Submit ▲

Tools >

Questions Event Actions History ?

★ Response is Required

On This Page Add or Import Export Questions

- Group 1: Form of Quote (4)
- Group 2: Terms and Conditions (3)
- Group 3: Payment Terms (5)

Group 1: Form of Quote Manage Group Delete Selected Questions

Instructions: Bidder shall read and answer the following questions. If there are exceptions to the terms, upload the Exceptions Form to the Vendor Attachments section and submit a question(s) in the Question and Answer Section. The blank form is available to download in Buyer Attachments section.

#	Question Text	Conditional Upon	Response Type	
1.1	Enter the Bidder's contact name, telephone number, and email address for questions regarding this solicitation ★	-	Text (Multi-Line)	<input type="checkbox"/>
1.2	Enter the number of years the Bidder has been in business in the text box.	-	Numeric Text Box	<input type="checkbox"/>
1.3	The State of Iowa requires shipping to be FOB Destination, Freight Prepaid. Does the Bidder agree to the terms? ★	-	Dropdown List (Pick One)	<input type="checkbox"/>
1.4	Reclaimed/Recycled Materials - Bidder's product contains the following percentage of the content that is reclaimed material: ___%	-	Numeric Text Box	<input type="checkbox"/>

Add Question

Group 2: Terms and Conditions Manage Group Delete Selected Questions

Instructions: Bidder shall read and answer the following questions. If there are exceptions to the terms, upload the Exceptions Form to the Vendor Attachments section and submit a question(s) in the Question and Answer Section. The blank form is available to download in Buyer Attachments section.

#	Question Text	Conditional Upon	Response Type	
2.1	Bidder shall read the Specification Terms and enter a response. ★	-	Dropdown List (Pick One)	<input type="checkbox"/>
2.2	Bidder shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	<input type="checkbox"/>
2.3	Bidder shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	<input type="checkbox"/>

Add Question

Previous Save Progress Next



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 Bid Manage Group Delete Selected Questions

Instructions: Bidder will read and answer the following questions. If there are exceptions to the terms, upload the Exceptions Form to the Vendor Attachments Section and submit a question(s) in the Question and Answer Section. The blank form is available to download in Buyer Attachments section.

#	Question Text	Conditional Upon	Response Type		
1.1	Enter the Bidder's contact name, telephone number, email address and shipping address for questions regarding this solicitation. ★	-	Text (Multi-Line)	Edit ▼	<input type="checkbox"/>
1.2	Enter the Bidder's State or Foreign Country of Residence. ★	-	Text (Single Line)	Delete	<input type="checkbox"/>
1.3	Bidder 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 Bidder has been in business in the text box. ★	-	Numeric Text Box	Edit ▼	<input type="checkbox"/>

Group 1: Form of Bid Manage Group Delete Selected Questions

Instructions: Bidder will read and answer the following questions. If there are exceptions to the terms, upload the Exceptions Form to the Vendor Attachments Section and submit a question(s) in the Question and Answer Section. The blank form is available to download in Buyer Attachments section.

#	Question Text	Conditional Upon	Response Type		
1.1	Enter the Bidder's contact name, telephone number, email address and shipping address for questions regarding this solicitation. ★	-	Text (Multi-Line)	Edit ▼	<input checked="" type="checkbox"/>
1.2	Enter the Bidder's State or Foreign Country of Residence. ★	-	Text (Single Line)	Edit ▼	<input checked="" type="checkbox"/>
1.3	Bidder 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 checked="" type="checkbox"/>
1.4	Enter the number of years the Bidder 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 Bidder 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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Additional Item Fields

Add Specifications to Bid Items or create your own Item Field

(Optional) Additional Item Fields

Additional Item Fields are where the Bidder shall answer additional questions about the Goods or Services in the Items Section.

For instance, located in the Library, there is a **Specifications Question** where the Bidder must answer **Yes** or **No** if they can meet the Specification.

Save Progress after the changes are made.

RFQ - Goods and/or Services

Template Status: **Published**

Template Settings

Description

Prerequisites **3**

Buyer Attachments **1**

Questions **12**

Additional Item Fields

Price Components

Items **2**

Exports And Imports

Vendor Responses >

Evaluation Committee Setup >

Additional Item Fields

Please create additional fields for items below.

Create Additional Field

Create Additional Field

Add Field From Library

Add Additional Item Fields from Library

Choose Where to Add From

Library * RFQ Goods and Services - 12.2022

Name	Field Type	Applicable To	Vendor Can Respond
<input type="checkbox"/> Specifications *	Yes/No	Product Line Item	Yes

> Show Display Position Options

* Required

Add Selected Item Fields Close



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Price Components

(Optional) Price Components

The Buyer may create or edit Price Components for the Items in the Bid.

There are two Price Components in the Library:

1. **Percentage Off Catalog**
2. **Price List**

Navigate to the Create Item Price Component to add one or more Components. **Save Progress**

The screenshot displays the 'Price Components' management interface. On the left, a sidebar lists navigation options: 'RFQ - Goods and/or Services', 'Template Status Published', 'Template Settings', 'Description', 'Prerequisites', 'Buyer Attachments', 'Questions', 'Additional Item Fields', 'Price Components' (highlighted with a red box), 'Items', 'Exports And Imports', 'Vendor Responses', and 'Evaluation Committee Setup'. The main area shows a table of components with columns: 'Name', 'Applicable To', 'Adjustment Type', and 'Restricted to Item Groups'. The table contains two rows: 'Percentage off Catalog' (starred) with 'Product Line Item' and 'Allowance (%)', and 'Price List' (starred) with 'Both' and 'Fee (Event Currency)'. A red box highlights the 'Create Item Price Component' dropdown button in the 'Price List' row. At the bottom right, a blue 'Save Progress' button is highlighted with a red box.

Name	Applicable To	Adjustment Type	Restricted to Item Groups
Percentage off Catalog ★	Product Line Item	Allowance (%)	<input type="button" value="Edit"/>
Price List ★	Both	Fee (Event Currency)	<input type="button" value="Edit"/>



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Items

Product Line Items and Service Line Items

Product Line Items

There are two tabs at the top of the Item Page:

1. **Product Line Items (GOODS)**
2. **Service Line Items**

Like the Questions Section, **Items** may be organized in **Groups**.

Product Line Items begin with a **“P”** and Service Line Items begin with an **“S”**.

P1.1 is a placeholder and is meant for the Buyer to edit. If this is a Service-only RFQ, then delete this line. The same process is used for a Goods-only RFQ; delete the placeholder line on the Services Line Item tab.

RFQ - Goods and/or Services

Template Status: **Published**

Template Settings

Description

Prerequisites: 3

Buyer Attachments: 1

Questions: 12

Additional Item Fields

Price Components

Items: 2

Exports And Imports: Add Product Line Item

Vendor Responses

Evaluation Committee Setup

Items History ?

Product Line Items (1) Service Line Items (1)

Go To: All Groups Add Group Add from Library Export Items

★ Unit Price is Required
⊙ Estimated Delivery Date is Required

Group P1: Specifications. Bidder must satisfy all the specifications to be deemed a Responsible Bidder Manage Group Delete Selected Item(s)
(1 - 1 of 1 items)

#	Name	Description	Catalog Number	Qty	UOM	
P1.1	Item names goes here		-	1	Each	Edit

Add Product Line Item

Save Progress

Product Line Items - Continued

The Buyer may add or import **Groups** by clicking the **Add or Import** button.

The selections are:

1. Add Item Group
2. Import from Library
3. Import from File (see next page)

Managing the Group is done from the drop-down box **Manage Group**.

The selections are:

1. Add New Item
2. Add Item from Library
3. Edit Group
4. Delete Group

A new Product Line Item may be added by clicking on the **Add Product Line Button**.

Items Event Actions History ?

Product Line Items (1) Service Line Items (1)

Go To All Groups Add or Import Export Items

★ Unit Price is Required
⌚ Estimated Delivery Date is Required

▼ Group P1: Specifications. Bidder must satisfy all the specifications to be deemed a Responsible Bidder Manage Group Delete Selected Item(s)
(1 - 1 of 1 items)

#	Name	Description	Catalog Number	Qty	UOM	Requested Delivery		
P1.1	Item names goes here	★ ⌚	-	1	Each	-	Edit	<input type="checkbox"/>

Add Product Line Item



Edit Product Line Item

By Clicking on the **Edit** button on the right side of the Item Line, the Buyer may **Edit** or **Delete** the Line.

If Edit is chosen, then the **Edit Product Line Item** menu pops up.

From here, edit the **Name**, **Product Description**, **Quantity** and **Units of Measure**. Be sure to look for the correct unit of measure from the drop-down list.



Edit Product Line Item

Name *

Description
2500 characters remaining

Catalog Number

Quantity

Make Quantity a Vendor Response Field

Unit of Measure *

Item Details

Requested Delivery Date Days after award

Requested Delivery Date
mm/dd/yyyy

Options Unit Price is Required
 Estimated Delivery Date is Required
Unit price will be required if Estimated Delivery is required.

Commodity Code -

Historical Unit Price USD

Target Price USD

Attach File

[Show Display Position Options](#)

* Required

Edit Product Line Item

If the Buyer needs a timeframe for delivery of the Good or Service, fill in the appropriate information.

The Buyer may make **Unit Price** and **Delivery Date** Required.

Add Commodity Code

Historical Unit Price and Target Price is not only helpful for the Bidder but also provides data for cost savings reports.

If an attachment is helpful for the Bidder, (for instance: pictures, specifications, etc.) a file may be uploaded by clicking the **Upload** button on the **Attach File** line.

When done, **Save Changes**.

A screenshot of a web application form titled "Edit Product Line Item". The form contains several input fields and checkboxes. Red boxes and arrows highlight specific elements: "Requested Delivery Date", "Options", "Commodity Code", "Historical Unit Price", "Target Price", the "Upload" button in the "Attach File" section, and the "Save Changes" button at the bottom right. The form fields include: "Name" (Item Description), "Description" (2500 characters remaining), "Catalog Number", "Quantity" (1.0000), "Unit of Measure" (EA - Each), "Requested Delivery" (Date selected), "Requested Delivery Date" (calendar icon), "Options" (Unit Price is Required checked, Estimated Delivery Date is Required unchecked), "Commodity Code" (-), "Historical Unit Price" and "Target Price" (both with USD units), and "Attach File" (No File Attached, Upload button). A "Show Display Position Options" link is also visible. The bottom right corner has "Save Changes" and "Close" buttons. A legend indicates that an asterisk (*) denotes a required field.

Service Line Item

Service Line Items are added the same way as Product Line Items.

Reminder: if the RFQ is a Service-only RFQ, then delete the placeholder line on the **Product Line Item** tab.

Service Groups are labeled with an “S”.

When finished adding Line items, click **Save Progress** or **Next**.

The screenshot shows the 'Items' tab in a procurement system. The interface includes a sidebar with navigation options and a main content area. The main content area displays a table of items. A red circle highlights the 'Service Line Items (1)' tab. Another red circle highlights the 'Group S1: Bid Specifications. Bidder must satisfy all the specifications to be deemed a Responsible Bidder' row. A third red circle highlights the 'S1.1 Service or Task Description' row. At the bottom right, a red box highlights the 'Save Progress' and 'Next' buttons.

#	Name	Description	Qty	UOM	Requested Service Delivery	
S1.1	Service or Task Description		1	Hour	-	<input type="checkbox"/>



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Vendors

Vendors Invited by Commodity Code & Add Vendors to Event

Vendors Invited by Commodity Code

If there are Vendors that have registered under the Commodity Codes that the Buyer entered earlier – either in the Setup Section or under the Items Section, then you will see the Vendors that will be notified when the RFQ goes “Live”.

RFQ test 12.22
005-RFQ-0279-2023

Type: Request for Quote
Event Status: Draft

Vendors

Vendors Invited by Commodity Code (0) Additional Vendors (0) Add Vendors to Event Add Vendors From Group

A commodity code has not been selected for this event.
[Select a commodity code now.](#)

Settings and Content

- Setup ▲
- Users ✓
- Description ✓
- Prerequisites 3
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- Additional Item Fields
- Price Components
- Items 2
- Vendors 0**
- Review and Submit ▲

Tools >

◀ Previous Save Progress Next ▶

RFQ test 12.22
005-RFQ-0279-2023

Type: Request for Quote
Event Status: Draft

Settings and Content

Setup ▲

- Users ✓
- Description ✓
- Prerequisites 3
- Buyer Attachments 1
- Vendor Attachments ✓
- Questions 12
- Additional Item Fields
- Price Components

Setup

Event Title * RFQ test 12.22

Event Type Request for Quote

Department Administrative Services

Event Number * 005-RFQ-0279-2023

Stage Title

Commodity Codes

Reporting Commodity Code - Edit

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes



Add Vendors to Event

The Buyer may add Vendors manually to be notified of the RFQ.

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**.

Vendors Event Actions ▾ History ?

Vendors Invited by Commodity Code (0) Additional Vendors (0) **Add Vendors to Event** Add Vendors From Group

Manually Invite Vendors ▾

Search Registered Vendors Show Advanced Search

Vendor

Relationship

Vendor Contact

Zip Code Within

Commodity Code

NAICS Code

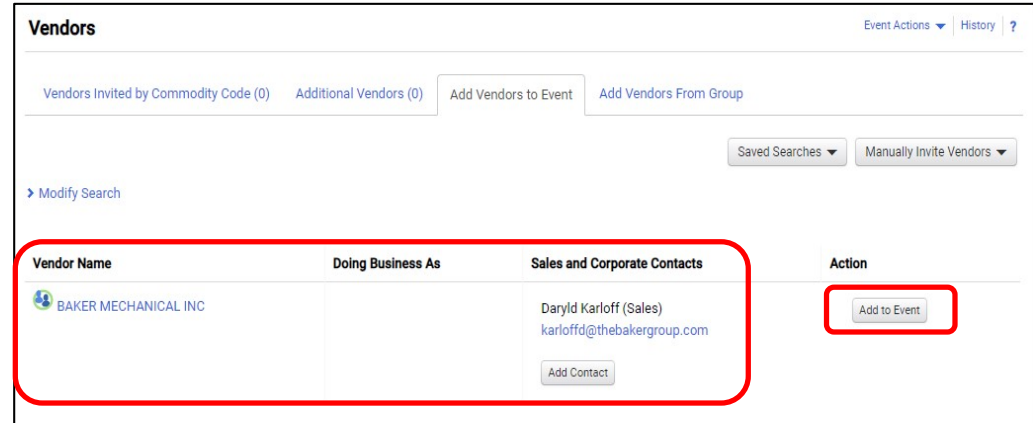
Manually Invite Vendors

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

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

Click on the **Manually Invite Vendors** Dropdown box.

Select **Add Vendor to Event**




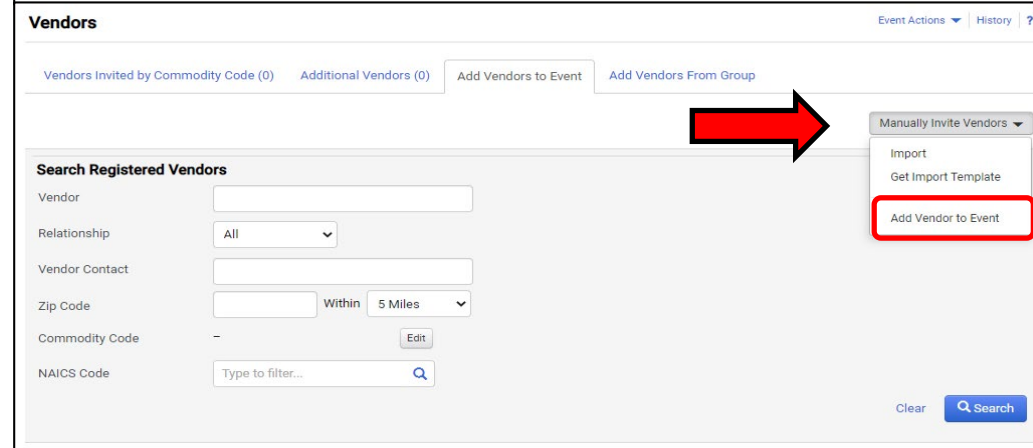
Vendors Event Actions History ?

Vendors Invited by Commodity Code (0) Additional Vendors (0) Add Vendors to Event Add Vendors From Group

Saved Searches Manually Invite Vendors

> Modify Search

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



Vendors Event Actions History ?

Vendors Invited by Commodity Code (0) Additional Vendors (0) Add Vendors to Event Add Vendors From Group

Manually Invite Vendors

Import
Get Import Template
Add Vendor to Event

Search Registered Vendors

Vendor

Relationship

Vendor Contact

Zip Code Within

Commodity Code [Edit](#)

NAICS Code [Q](#)

Clear [Search](#)



Manually Invite Vendors

An **Add Vendor to Event** popup window opens and the Buyer may add the Vendor name and email address.

The Buyer may **Save** or **Save and Add Another**.

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

Select **Get Import Template**.

Add Vendor to Event [X]

Vendor Name *

Sales or Corporate Contact Name

Email *

* Required

Vendors [Event Actions] [History ?]

Vendors Invited by Commodity Code (0) Additional Vendors (0) Add Vendors to Event Add Vendors From Group

Manually Invite Vendors [v]

Import

Get Import Template

Add Vendor to Event

Search Registered Vendors

Vendor

Relationship All [v]

Vendor Contact

Zip Code Within 5 Miles [v]

Commodity Code [Edit]

NAICS Code [Type to filter...] [Q]

Clear [Search]



Manually Invite Vendors

Once the Template has been downloaded, the Buyer will see an Excel Spreadsheet with an **Instructions** tab and an **Import Data** tab. Click on the Import Data Tab and fill in the required information (See next page).



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).

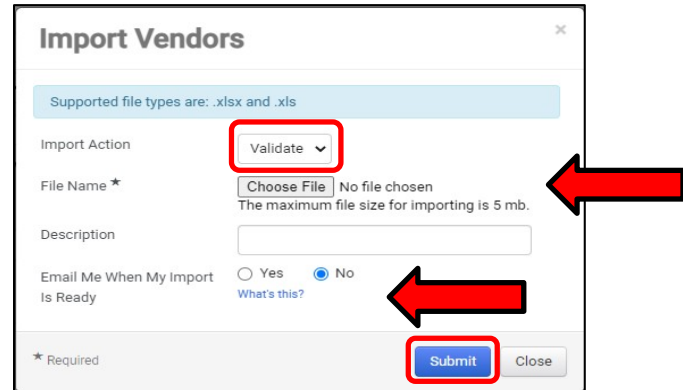
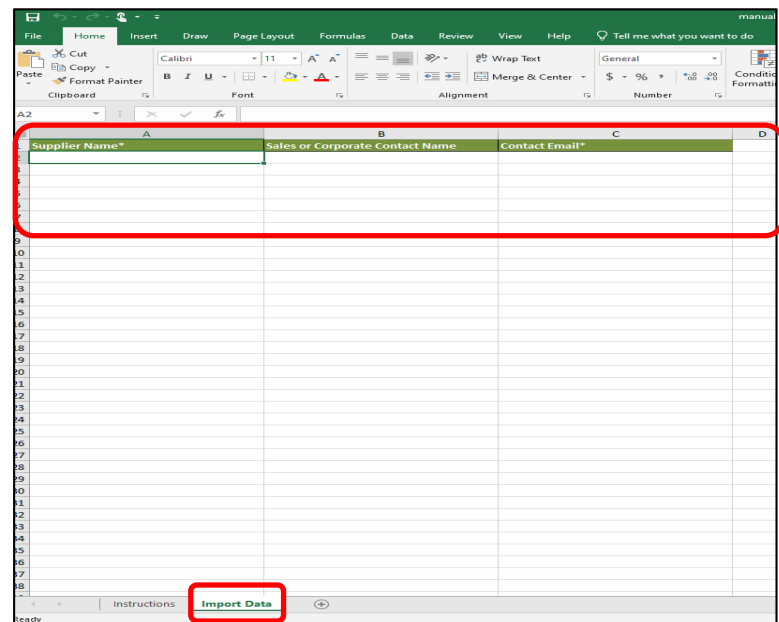
Header Field Name	Description
Supplier Name*	This is the name of the supplier being invited.
	This is the name of the sales or

Manually Invite Vendors

Select the Import Data tab and input the Vendor information. Once the data has been input into the spreadsheet and the Buyer has saved the file on their computer, return to the **Manually Invite Vendors** dropdown box on the Vendors page and select **Import**.

Select **Validate** as the Import Action, choose the saved spreadsheet and click the **Yes** radio button if the Buyer wants to be notified when IMPACS is done with the validation of the data.

Click **Submit**



Manually Invite Vendors -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.

This screenshot shows the 'Exports and Imports' interface. On the left sidebar, the 'Exports and Imports' menu item is highlighted with a red box. The main table displays one entry with a status of 'Pending', which is also circled in red. The table columns include Type, Collateral, Description, Requested By, Requested At, Status, and File.

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

This screenshot shows the 'Exports and Imports' interface after the validation is complete. The status of the entry has changed to 'Completed', and a download link for the file 'manuallyInviteSuppliersTemplate (4).xls' is visible. A red arrow points to this download link. The 'Refresh this Page' button in the top right corner is also circled in red.

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



Import Vendor File

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

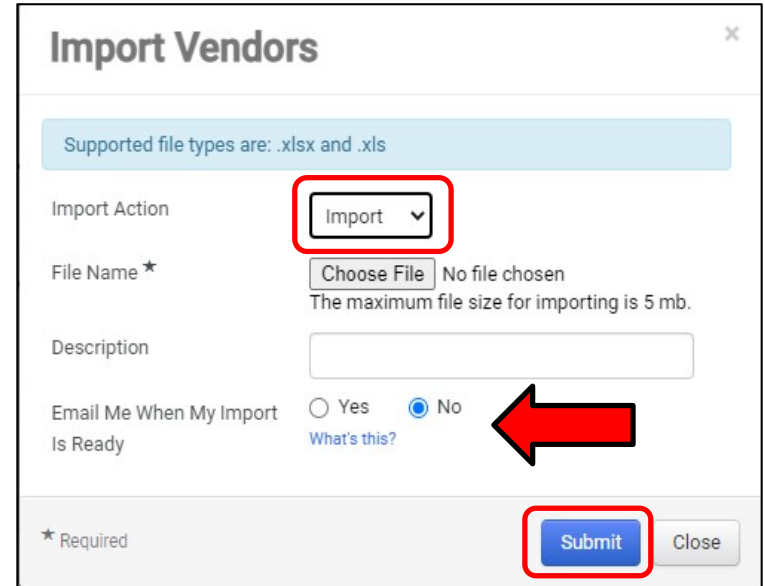
For Import Action, Select **Import**.

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.

As an alternative, the Buyer 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 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. A large red arrow points to the "No" option.
- Footer:** A grey bar with a "* Required" label, a blue "Submit" button (highlighted by a red box), and a "Close" button.

Additional Vendors

Once the file has been imported, or if the Buyer used 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 also 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" and "History". 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 are three buttons: "Add Vendors to Event" and "Add Vendors From Group". The main content area 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 vendor name "SOIJAGGAERTEST". The "Sales and Corporate Contacts" column for this vendor lists "Laura Shannon (Sales)" and "SOIJAGGAERTEST@gmail.com", with an "Add Contact" button below. The "Action" column for this vendor has a "Remove" button, which is highlighted with a red box. At the bottom right of the interface, there are three buttons: "Previous", "Save Progress" (highlighted with a red box), and "Next".

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



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Review and Submit

Errors and Approval

Review and Submit

The last step in the RFQ creation process 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.

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 36
- Additional Item Fields
- Price Components
- Items 2
- Vendors 1

Review and Submit ▲

Tools >

Review and Submit 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.

⚠ Please complete all required sections to submit this event.

Section	Progress	Action Needed on the Following
Setup	⚠ Incomplete	⚠ Close Date ⚠ Q&A Submission Close Date ⚠ Open Date
Users	✓ Required Fields Complete	
Description	✓ Required Fields Complete	
Prerequisites	2 No Required Data	
Buyer Attachments	1 No Required Data	
Vendor Attachments	✓ No Required Data	
Questions	36 No Required Data	
Items	2 Required Data Provided	
Vendors	1 Required Data Provided	

[View Approval Steps](#)

[Previous](#) [Submit for Approval](#)

Review and Submit

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

The RFQ will enter the approval workflow and the approver will either approve or send the RFQ back for revisions.

Review and Submit

Event Actions | History | ?

i 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.

✓ All sections are complete. You may submit your event for approval.

Section	Progress
Setup	✓ Required Fields Complete
Users	✓ Required Fields Complete
Description	✓ Required Fields Complete
Prerequisites	2 No Required Data
Buyer Attachments	1 No Required Data
Vendor Attachments	✓ No Required Data
Questions	36 No Required Data
Items	2 Required Data Provided
Vendors	0 Required Data Provided

> View Approval Steps

◀ Previous **Submit for Approval**



Approval

The Buyer may view the Approval Workflow by expanding the **View Approval Steps** tab. If the Buyer has an Approver assigned to them, then the RFQ will go live on the date indicated on the setup page after the Approver has approved the RFQ.

If there are no approvers for the RFQ, then **Return to Event**.

✓ **Event Submitted for Approval**

Next Steps
What would you like to do next? Here are links to common actions:

- [Return to My Event](#)
- [Add Another Event](#)
- [Go to My Home Page](#)
- [Go to Sourcing Dashboard](#)

▼ **View Approval Steps**

Solicitation Approval Workflow Solicitation Evaluation Workflow

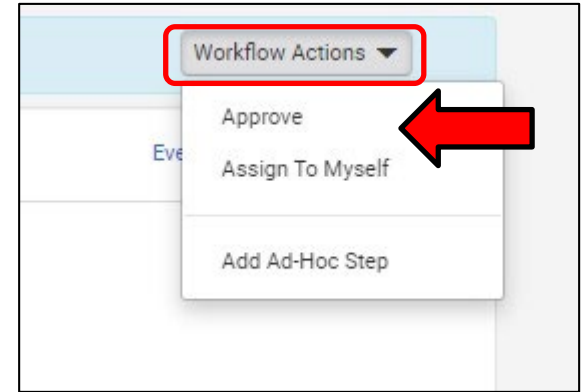
Submitted
12/28/2022 10:19 AM

Event Approval
Active
[View approvers](#)

Finish

Approval

After returning to the RFQ Event, click on the **Workflow Actions** dropdown box in the upper right portion of the screen and select **Approve** (some Buyers might need to **Assign To Myself** depending on their permissions).



Leave a comment and select **Approve**.

The RFQ is complete and will post to the public website on the date and time specified on the **Setup** page.

The Buyer is finished with the RFQ creation process.

A screenshot of a dialog box titled "Approve". The dialog box has a close button (X) in the top right corner. Below the title, there is a text input field with the placeholder text "Enter a comment for approving the solicitation. ★". The input field contains the text "Test for PP". Below the input field, it says "989 characters remaining". At the bottom left, there is a star icon followed by the text "★ Required". At the bottom right, there are two buttons: "Approve" (highlighted with a green border) and "Cancel".



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Vendor Responses

Before RFQ 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 RFQ closes, you may find that the Bidders are in various stages of responding to the event.

If the RFQ 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 quote but failed to **Review, Certify and Submit**.

The screenshot displays the 'Vendor Responses' interface. On the left sidebar, 'Vendor Responses' is highlighted with a red box. The main content area shows a table with 2 invited vendors. The first vendor, SOIJAGGAERTEST, has a 'Response In Progress' status (circled in red) and 100% completion (circled in red). The second vendor, Laura Shannon, has an 'Event Not Viewed' status. The interface includes a 'Save Progress' button at the bottom right.

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 ▾

RFI 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.

Please note that the Exception From is no longer used. If a Bidder takes exception to any Terms & Conditions, they should submit a question in the Questions and Answer section. The Buyer will either Accept or Reject the exception in the answer to the Bidder exception question.

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 SOIJAGGAERTEST

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**.



Answer Question

Timeframe
Can the Bid be extended?
Asked 12/28/2022 at 11:35 AM by [Laura Shannon \(SOIJAGGAERTEST\)](#)

Enter Answer Below

Answer [★]

5000 characters remaining

Vendor Response Disabled

Attachment

Drop file to attach, or browse.

Post to Public Q&A? [★] Yes No

[★] Required

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 ⓘ	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 RFQ.

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 ▾ **SOJAGGAERTEST** ▾ 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 ▾

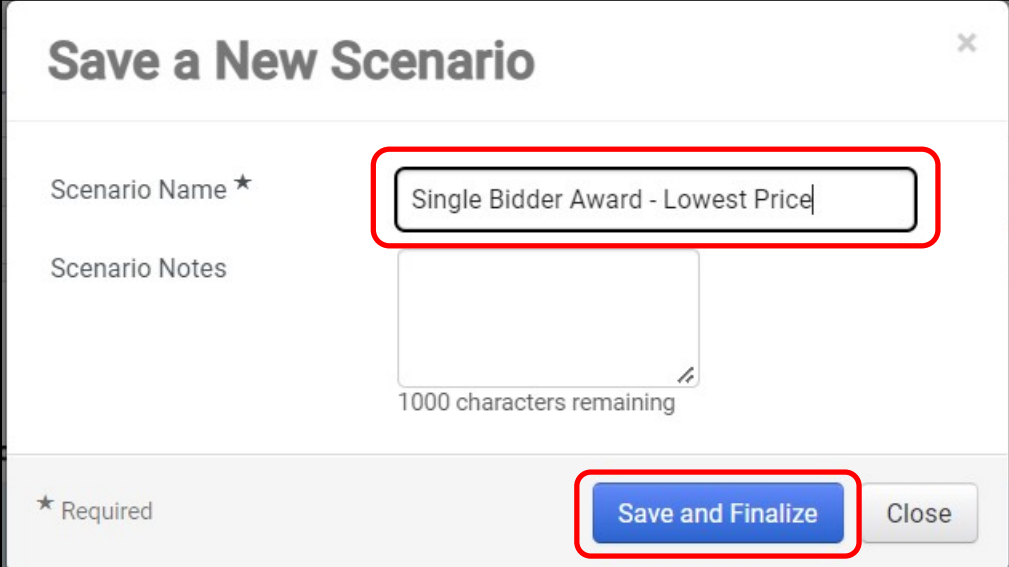
SOIJAGGAERTEST ▾

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 Bidder's name.

If using the Scenario option, 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'. The main content area is divided into two columns: 'Scenario Award Actions' and 'Awarded Scenario'. In the 'Awarded Scenario' column, the name 'SOIJAGGAERTEST' is displayed with a dropdown arrow, and a green 'Pending Award' tag is shown below it. This tag is also highlighted with a red box. At the bottom of the 'Awarded Scenario' column, there is a text area for 'Response Notes' with 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 blue banner indicates the status is **Under Evaluation** and that the response(s) from **SOJAGGAERTEST** is Pending Award. Below this, a red box highlights the scenario details: **Award Scenario "Single Bidder Award - Lowest Price" for Test 17011**, with a **Finalized** button next to it. The interface includes several buttons: **Load Saved Scenario**, **Export**, **Finalize Award**, and **Remove Finalized Award**. A red arrow points to the **Remove Finalized Award** button. Below the buttons, there are tabs for **Scenario Navigator**, **Scenario Breakdown**, and **Scenario Savings**. At the bottom, there are dropdown menus for **Sort Bids by:** (Total Bid) and **Ascending**, and a checkbox for **Show Vendor**. The **Awarded Scenario** is listed as **SOJAGGAERTEST** with a **Pending Award** status.



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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

Email Template Location

The screenshot shows the IMPACS system interface for 'RFQ Test 006' (005-RFQ-0280-2023). The event status is 'Awarded'. The 'Award Notifications' section contains a table with the following data:

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

The 'Tools' menu is open, showing options: Internal Notes, Exports and Imports, Q & A Board, Approvals, and **Award Notifications**. Under 'Award Notifications', the 'Public Site Award Attachments' option is highlighted, with an 'Add Attachment' button and the text 'No attachments have been added.'

Award Notifications

Awarded Vendor Email Template

Date

Solicitation Number and Title: **XXX-RFQ-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.sciquest.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-RFQ-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.

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

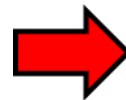
After the appeal period has ended, navigate to **Workflow Actions** and select **Approve**. The Pending Award Vendor is now Awarded.

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 **SOIJAGGAERTEST** 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
- Q & 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) Laura Shannon View approvers → **Award To Supplier** (Future) Expedite → Finish Expedite

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.

Awarded This event has been awarded to **SOJAGGAERTEST**.

Award Scenario for 1

Load Saved Scenario Export

Scenario Navigator Scenario Breakdown Scenario Savings

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

Awarded Scenario **SOJAGGAERTEST** **Awarded**

Response Notes

Auto Score 0

Total Adjusted Bid 50,640.00 USD

You may view the [scenario breakdown](#). This event is **Awarded**. You may view responses.

Workflow Actions

est010 2005-RFB-0254-2023

Type: Request for
Event Status: Awarded

Settings and Content

Vendor Responses

Vendor Responses

Progress **Awarded**

Vendor Responses

Response % Complete	Vendor Name	Required Items Total Bid	Optional Items Total Bid
100%	SOJAGGAERTEST	50,000.00 USD	640.00 USD (1 of 1)

View Response

Save Progress





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Export and Publish

Export and Publish

Under the **Tools/Award Notifications:**

Export the RFQ 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.



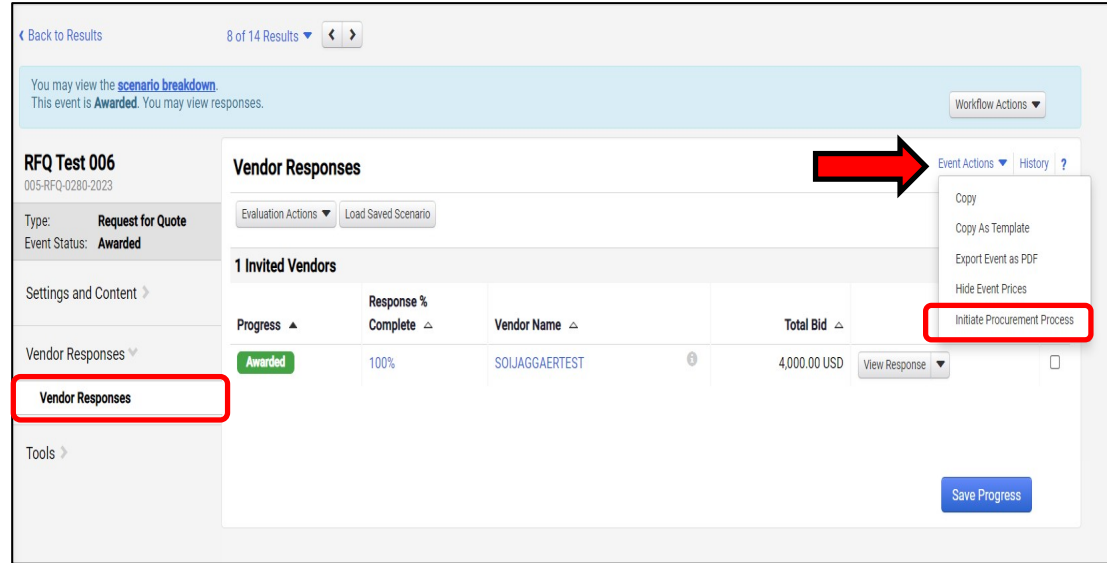
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Initiate Procurement Process

Initiate Procurement Process

To create a purchase requisition from the RFQ, 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 'Vendor Responses' table, 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.

Vendor Responses

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

Event Actions: Copy, Copy As Template, Export Event as PDF, Hide Event Prices, **Initiate Procurement Process**

Initiate Procurement Process

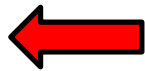
The Confirm Procurement Request Popup appears. Verify that your name is correct.

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

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

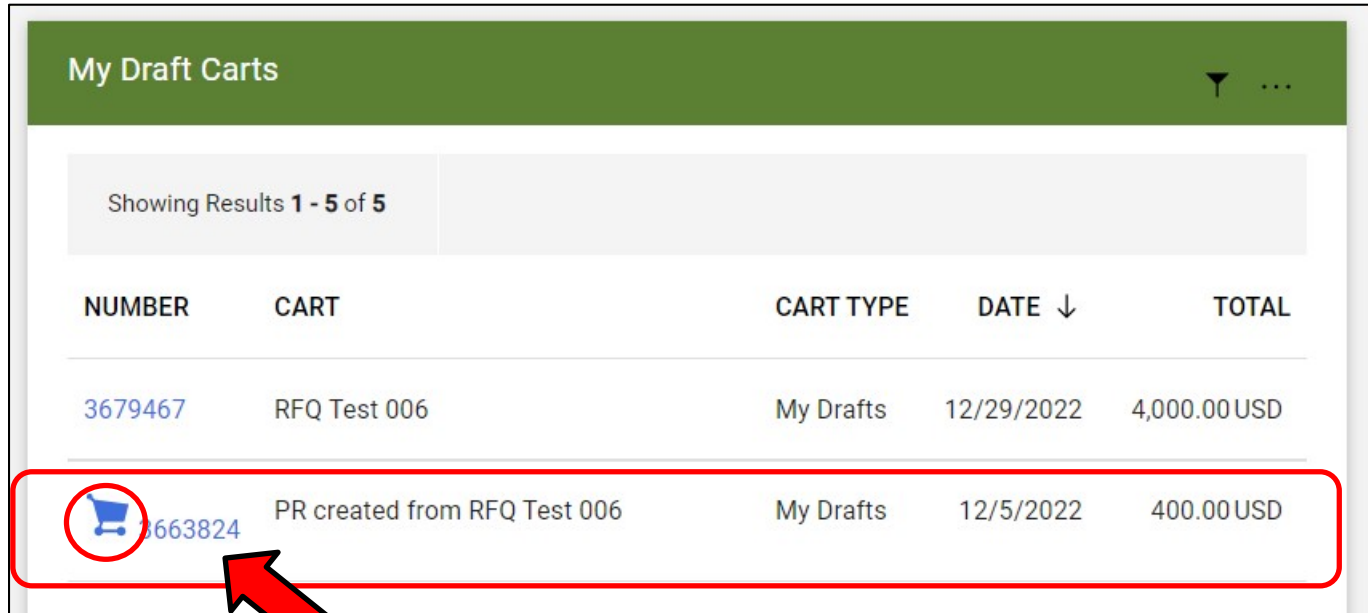
Showing Results 1 - 5 of 5

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.



My Draft Carts

Showing Results 1 - 5 of 5

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3679467	RFQ Test 006	My Drafts	12/29/2022	4,000.00 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

Details

For
Laura Shannon

Name

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 ...

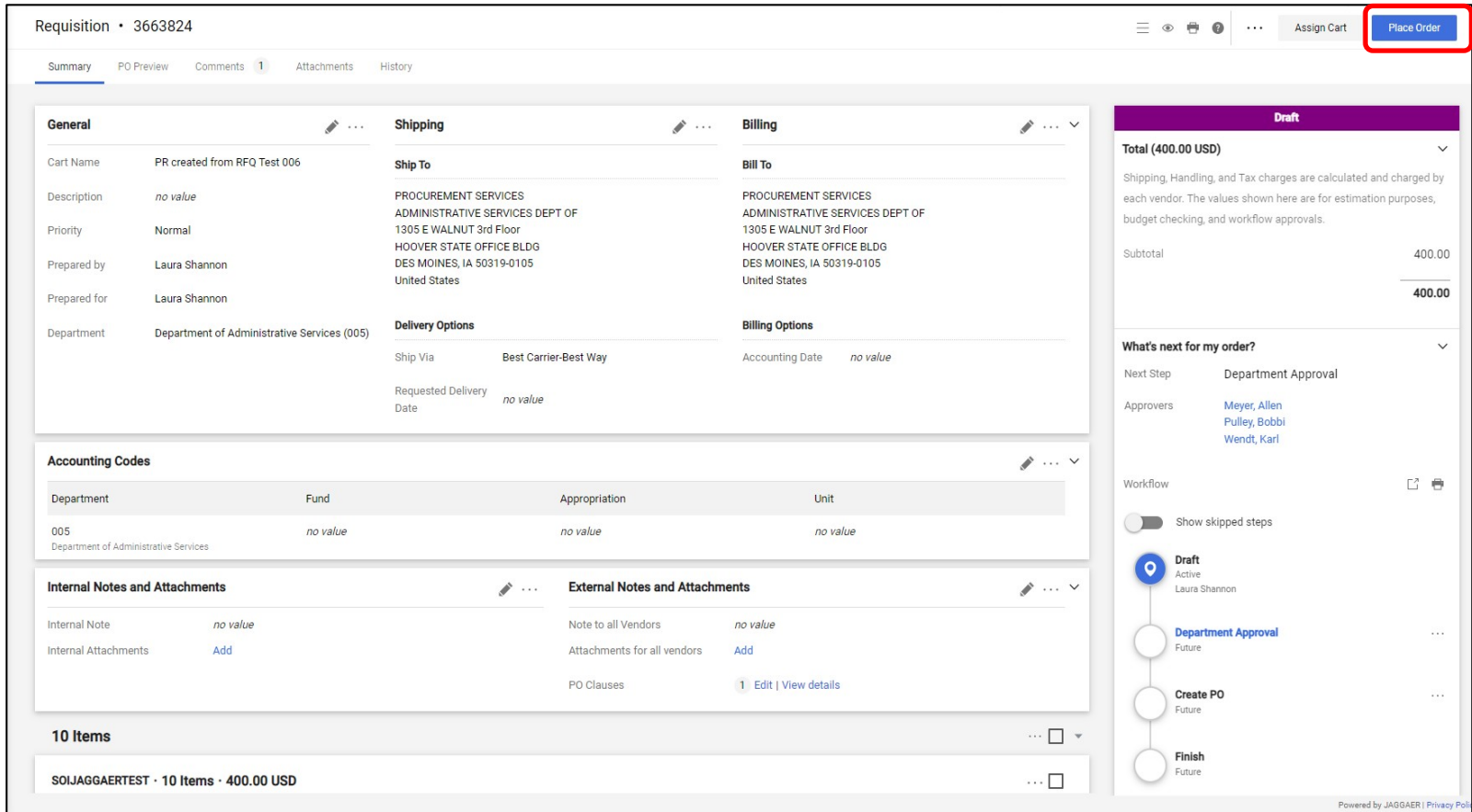
Finish
Future

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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 'Procurement and Contracts System' interface. On the left, a dark sidebar contains navigation options: 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, containing the following items: 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 table with a green header row containing '63824 Submitted'.



**Department of
Administrative Services**

*Empowering People
Collaboration
Customer Service*

Questions?

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laura.shannon@iowa.gov