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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

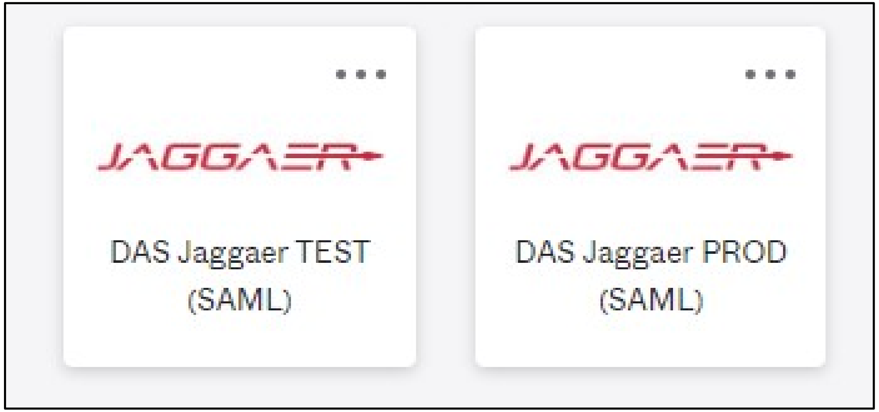
The Request for Quotes process includes the following steps:

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)

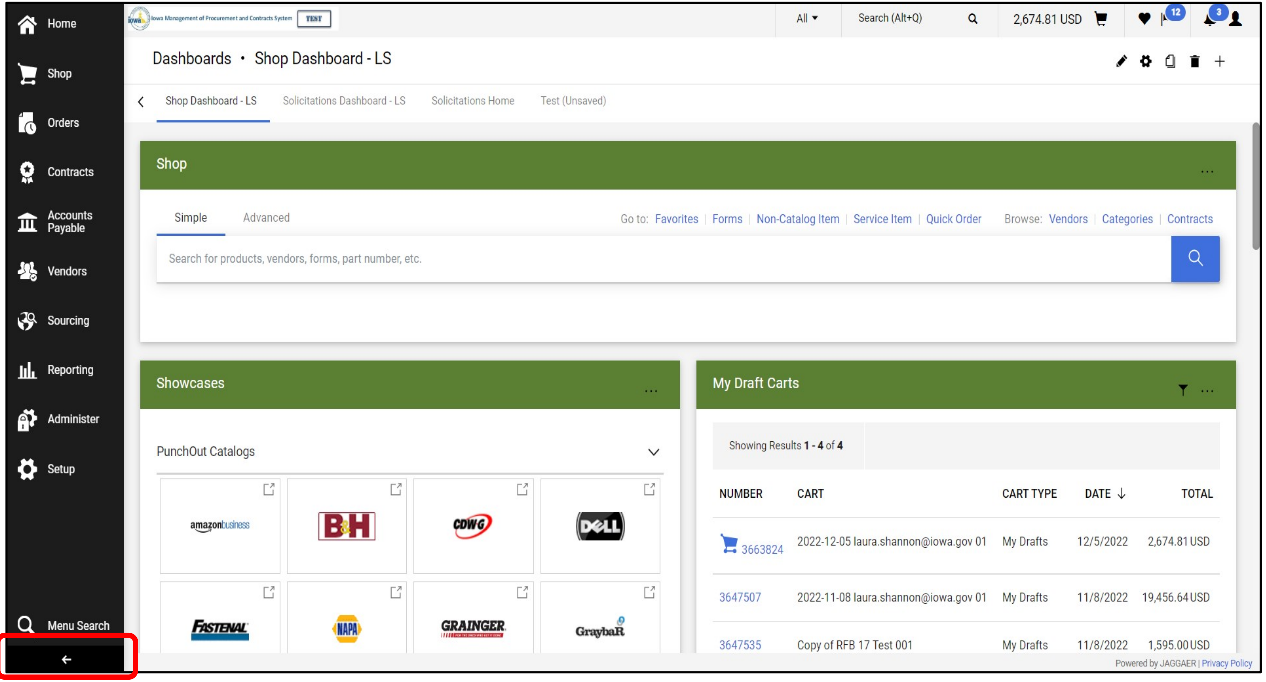
Post all solicitations to the TSB web page at least 48 hours prior to a general posting in IMPACS. The password to the TSB web page changes monthly; each agency shall assign an employee current access to the web page.

Sign into Okta and locate the Jaggaer stickers



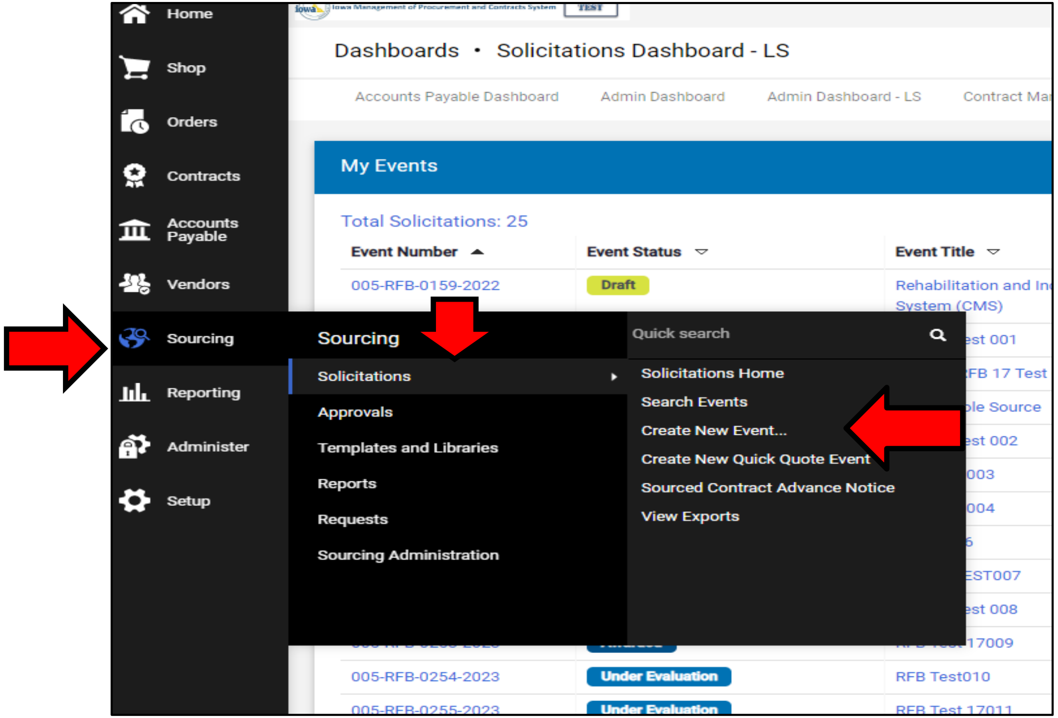
Best practice: Create an RFQ in the IMPACS (Jaggaer)test environment before posting in the Production (PROD) live site.

Left Menu Descriptions



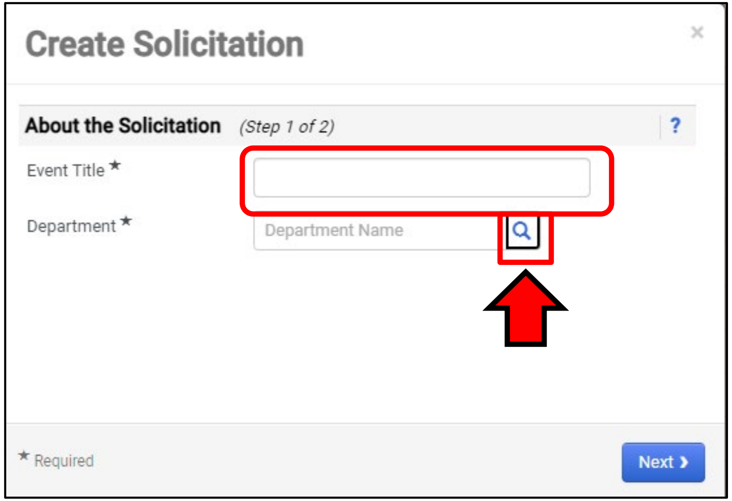
Expand to see icon labels by clicking on the small arrow at the bottom.

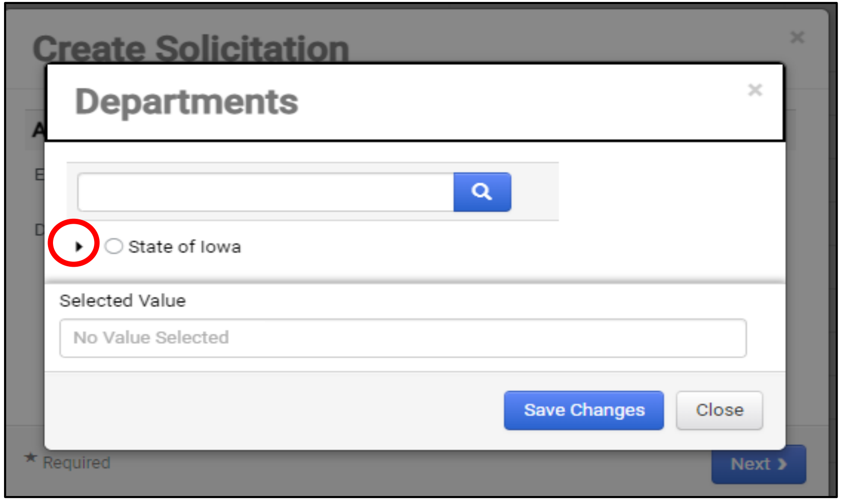
Create New Event



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

Create Solicitation





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

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

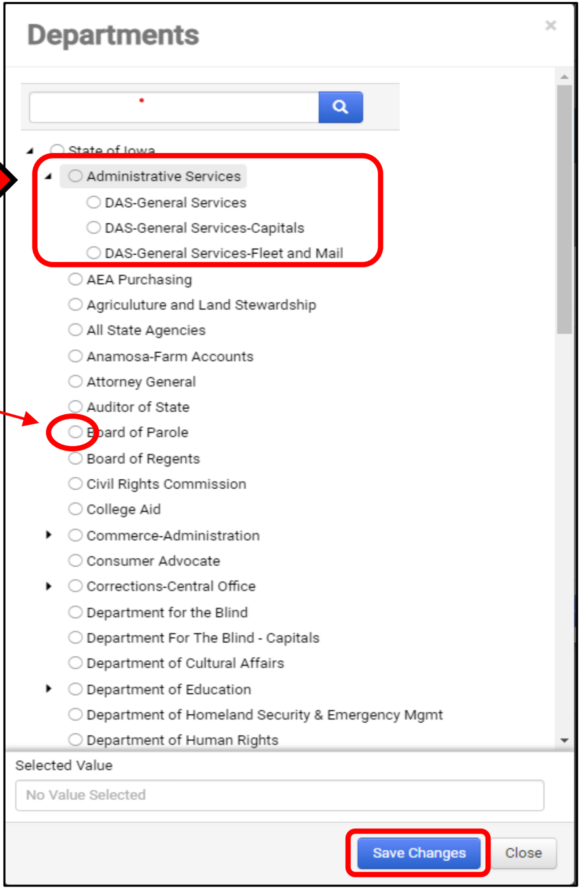
3. Expand the small arrow to see a drop-down menu of all State of Iowa Departments.

Adding Department (Agency)

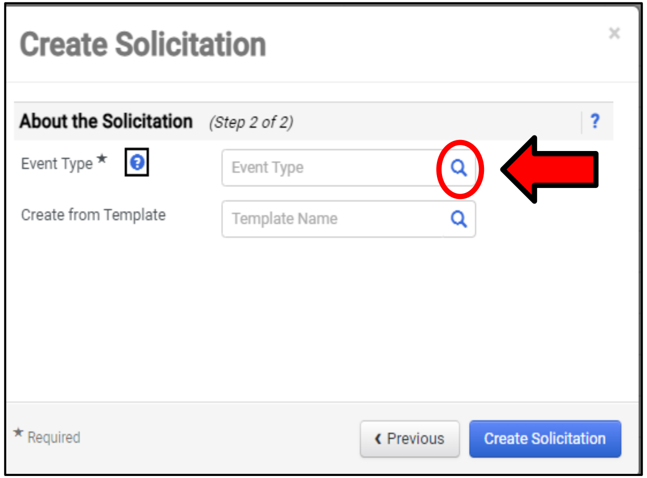
Please note that there are sub-menus for parent Agencies.

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

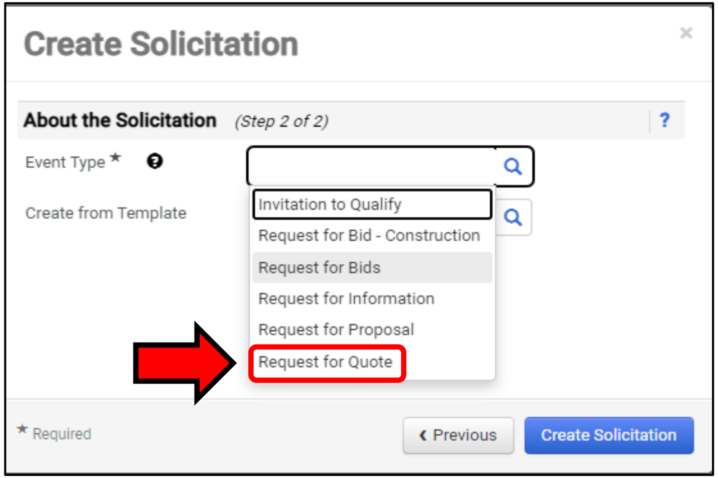
After you have selected your department, click **Save Changes** at the bottom of the Department search page.



About the Solicitation

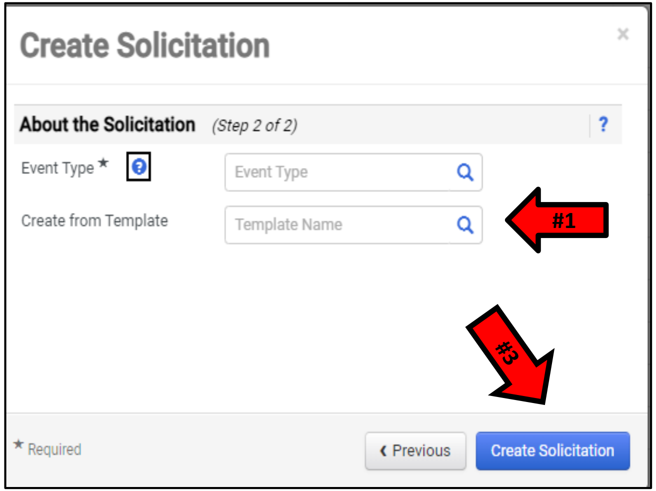


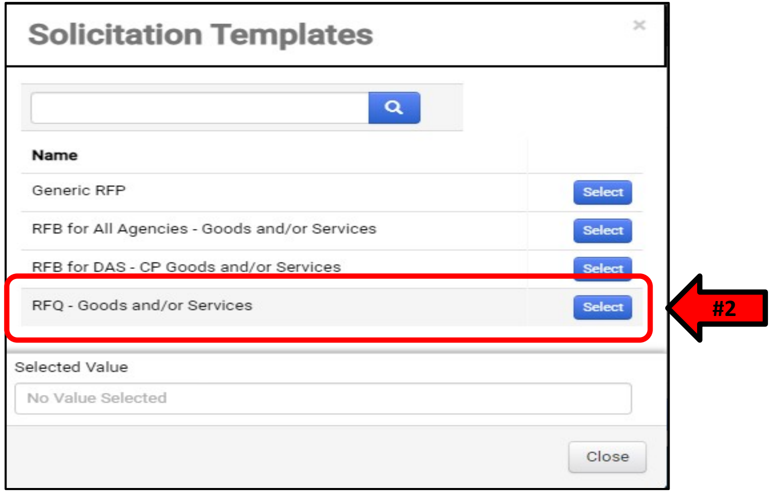
Click the **Search** icon (magnifying glass) to select the type of solicitation being created.



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

Create from Template

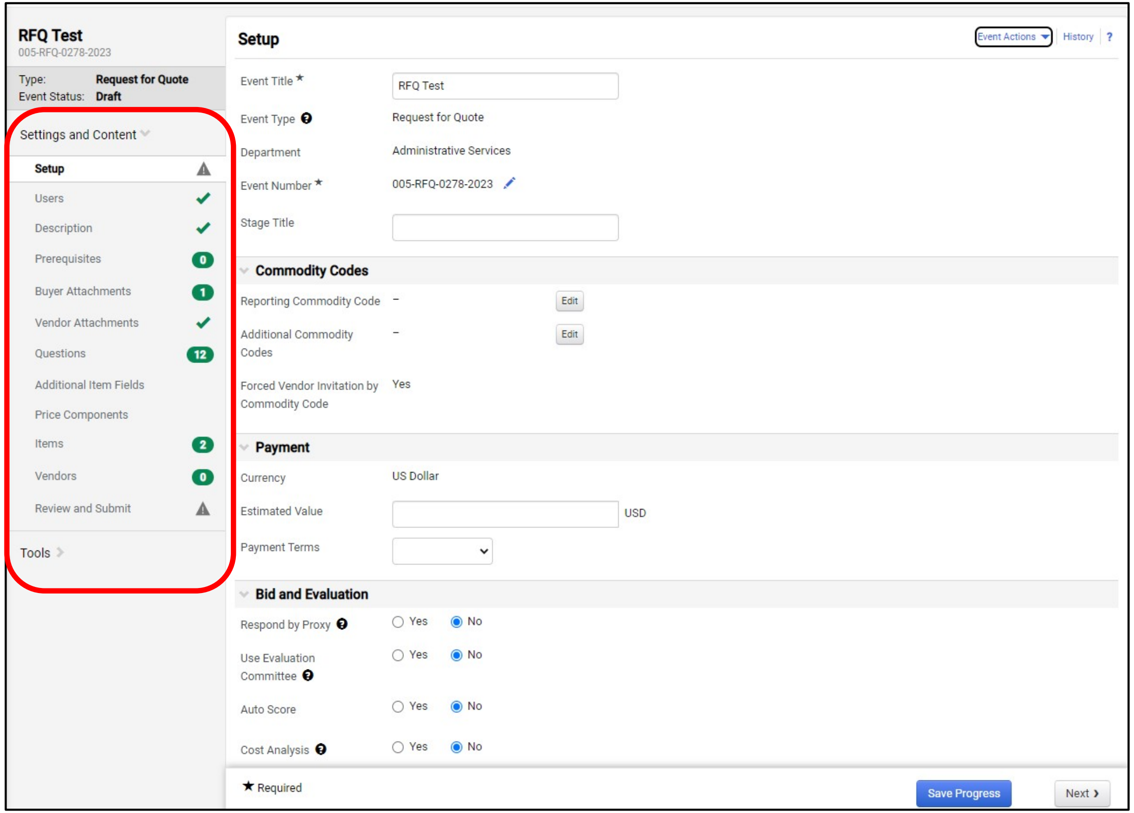




1. Click on the **Search** icon to select from the RFQ templates available.
2. Select **RFQ – Goods and/or Services.** Click **Select** to load the **Template.**
3. Click on **Create Solicitation.**

Settings and Content

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



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Setup Wizard

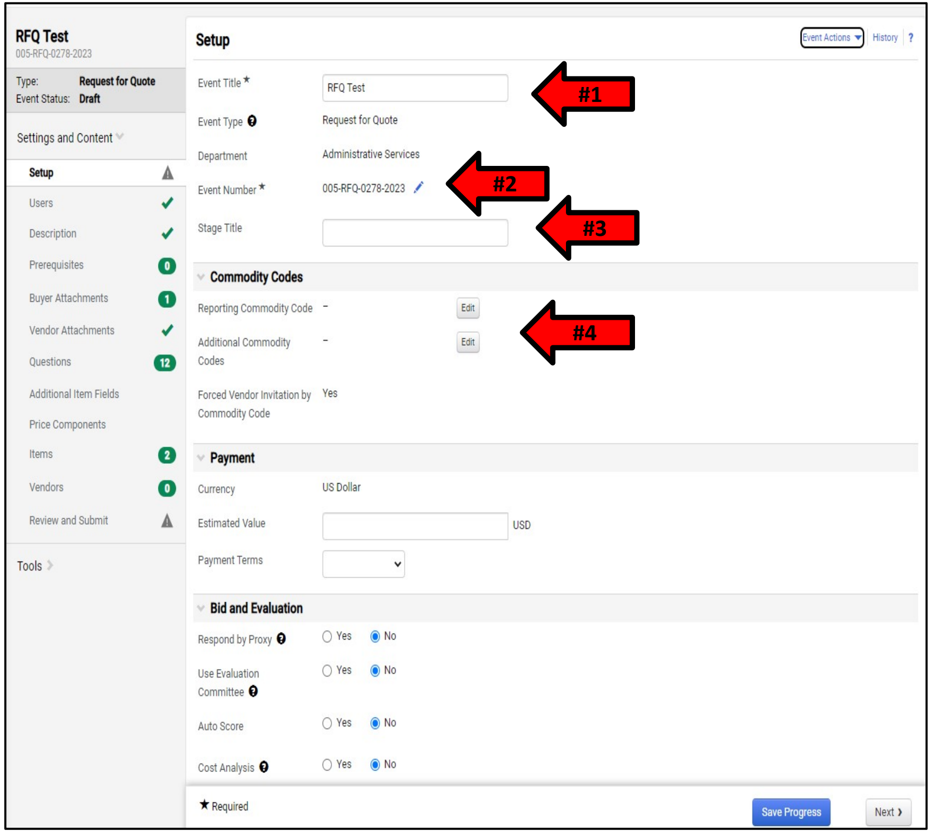
Setup

1. Name the RFQ

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

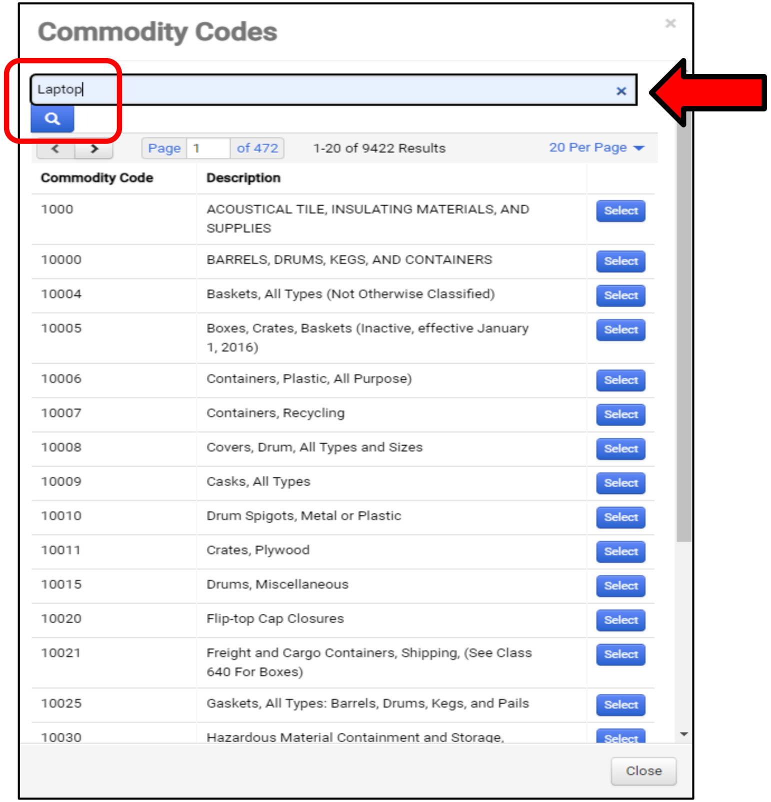
3. Ignore **Stage Title.**

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.



Setup – Commodity Codes

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

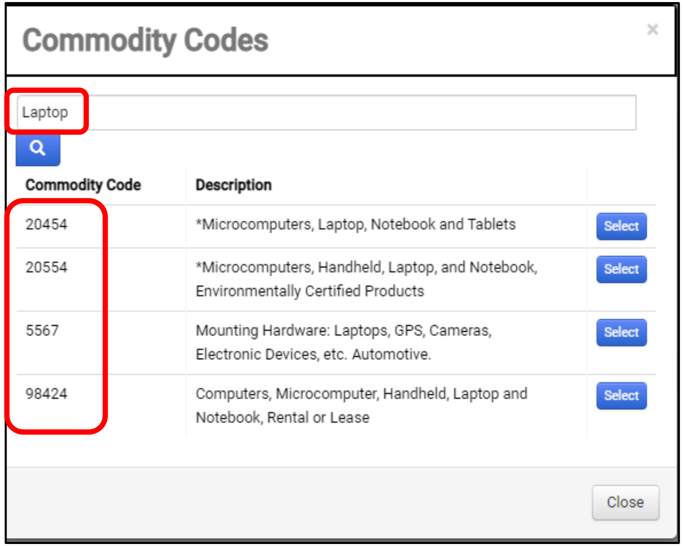


Setup – Commodity Codes

These are the Commodity Codes that 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**.

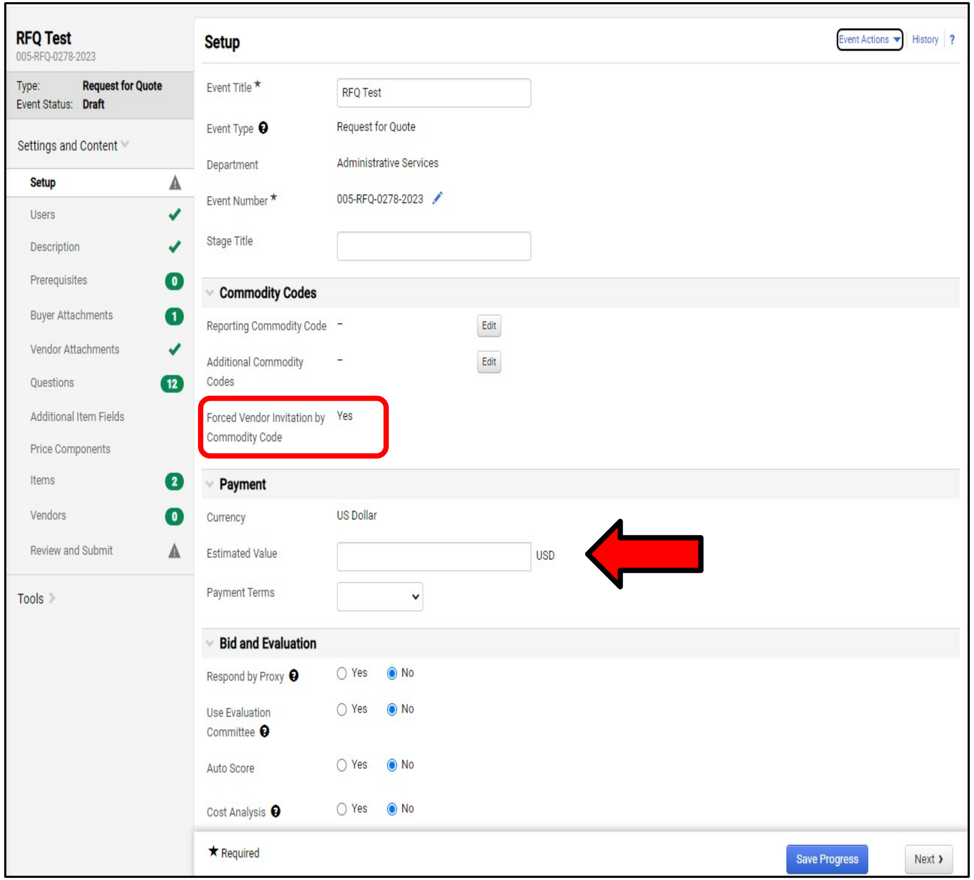


Setup – Commodity Codes & Payment

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**.

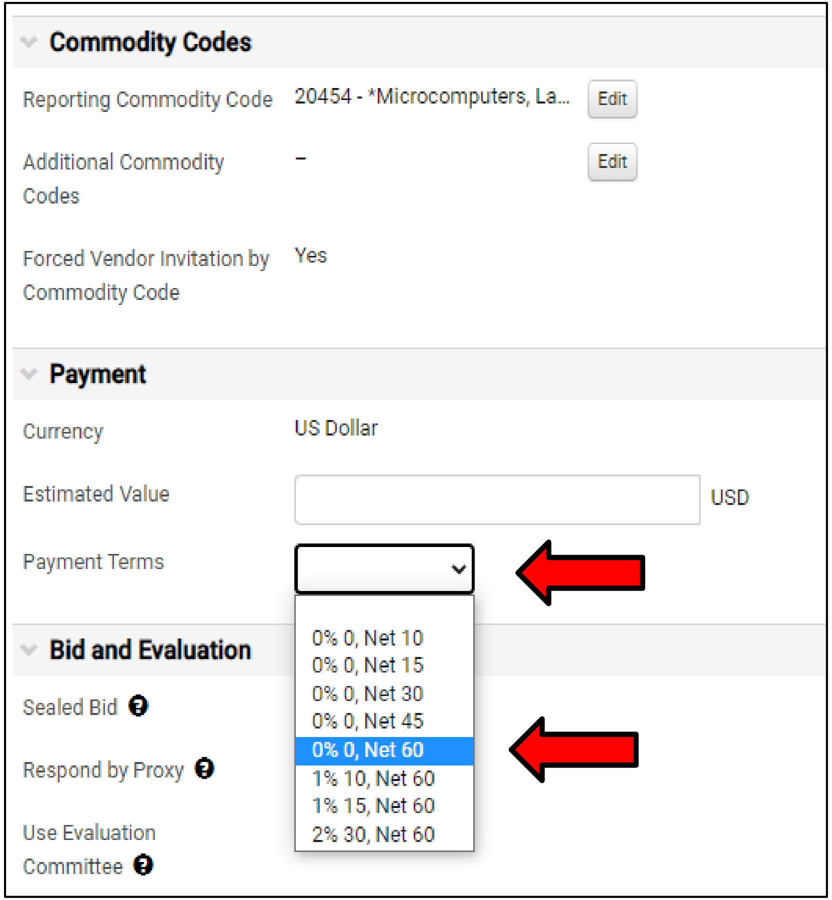
The default **Currency** is **US Dollar**.

Please estimate the value of the RFQ.



Setup - Payment

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

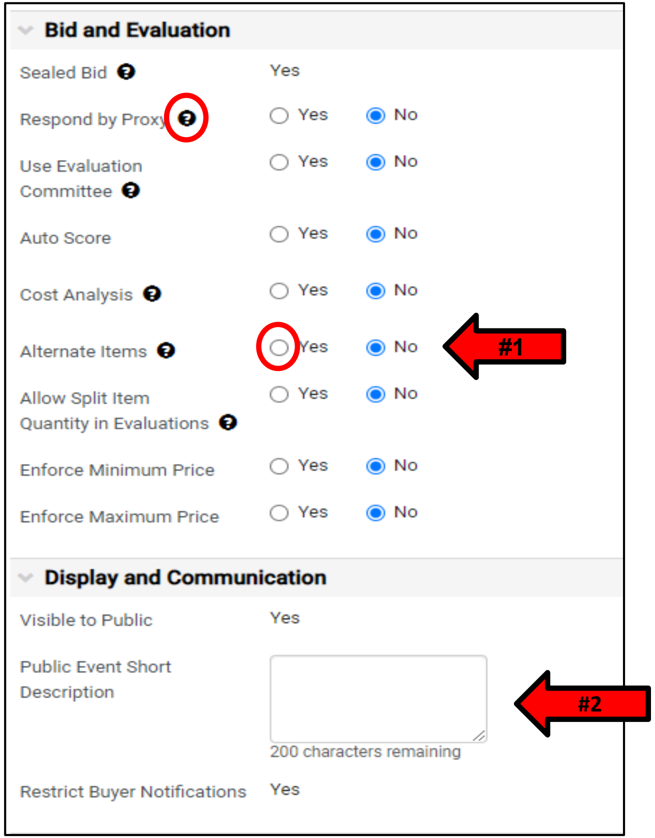


Setup - Bid and Evaluation & Display and Communication

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

1. If the Buyer wants the Bidder to offer **Alternate Items** in their bid, then select the **Yes** radio button.

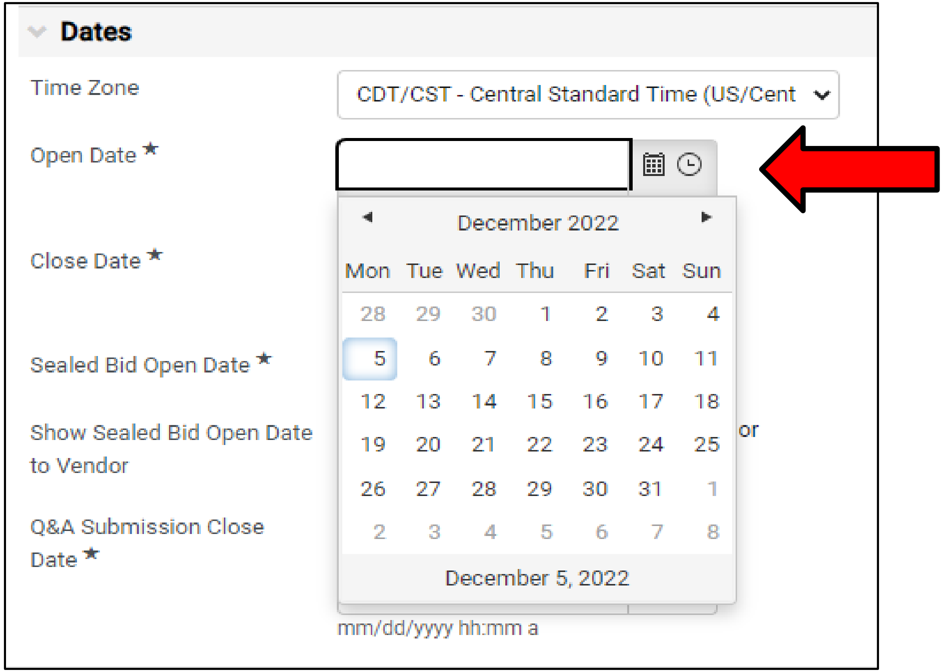
2. Include a brief description of the Goods and/or Services you seek.



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.



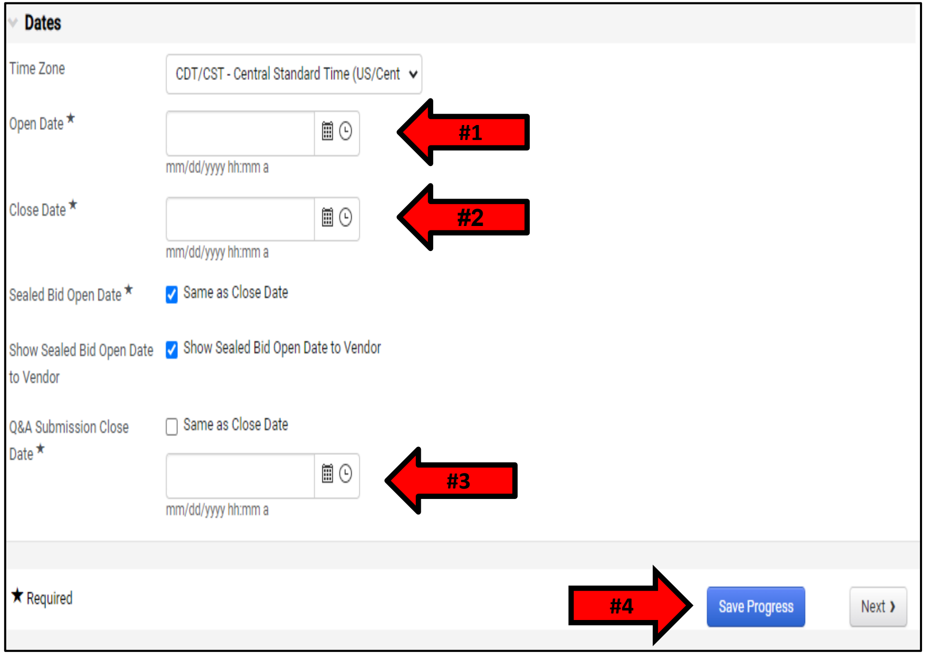
Setup – Dates & Next Section in the Wizard

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.



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Users Wizard

Add & Edit Users

Users

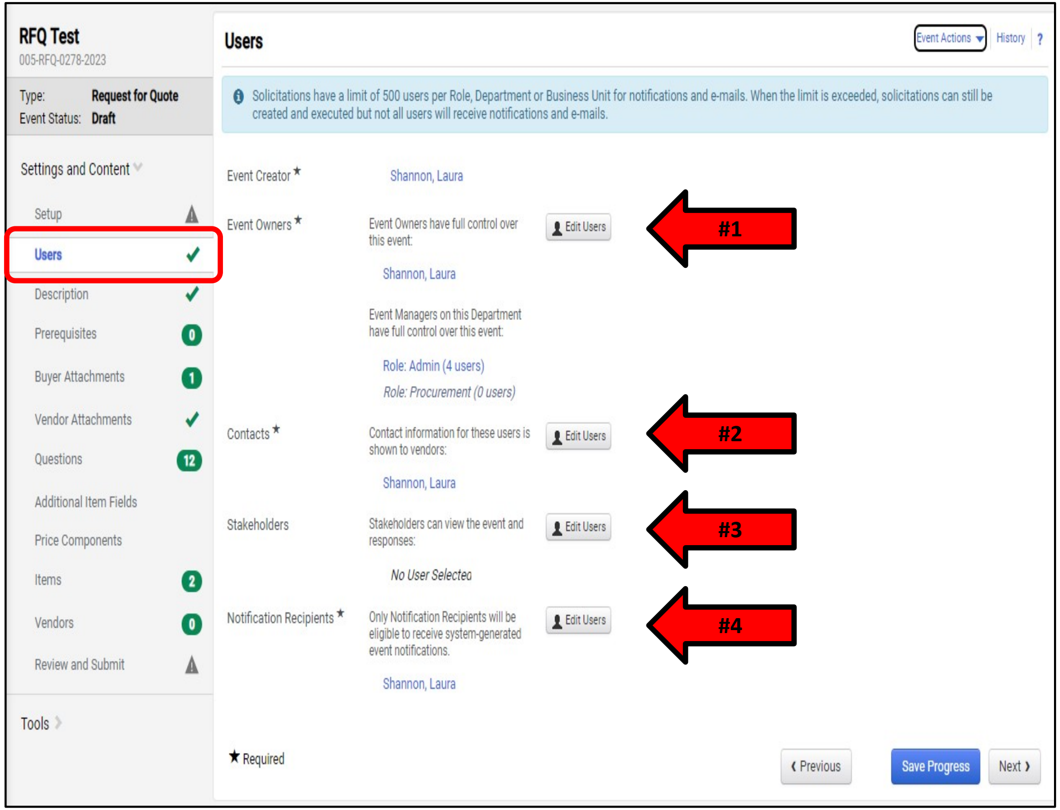
The Buyer may add Users for access to the RFQ.

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.



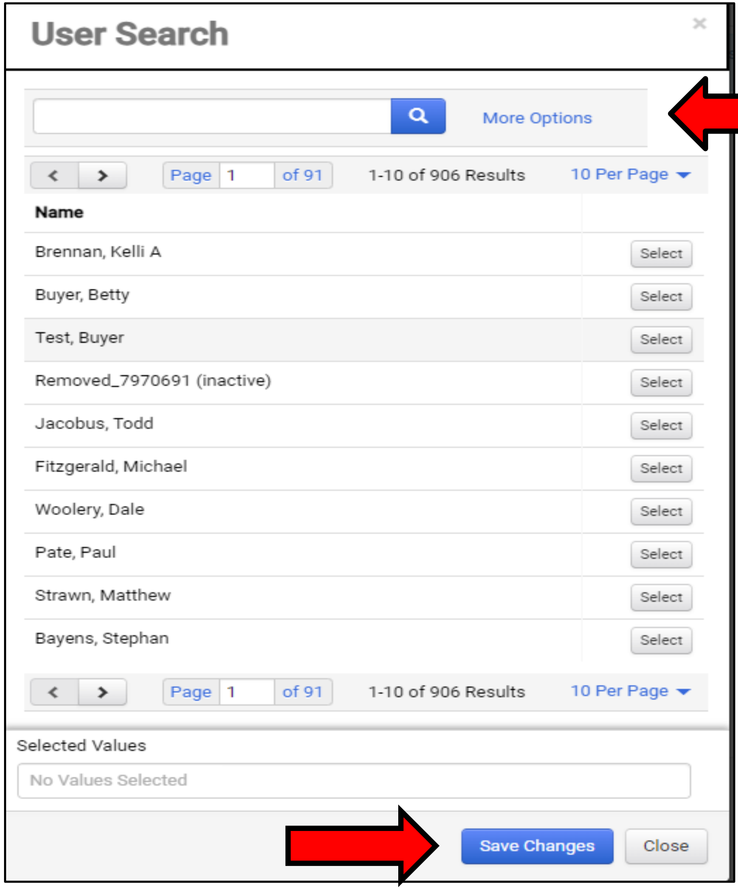
Users – User Search

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.

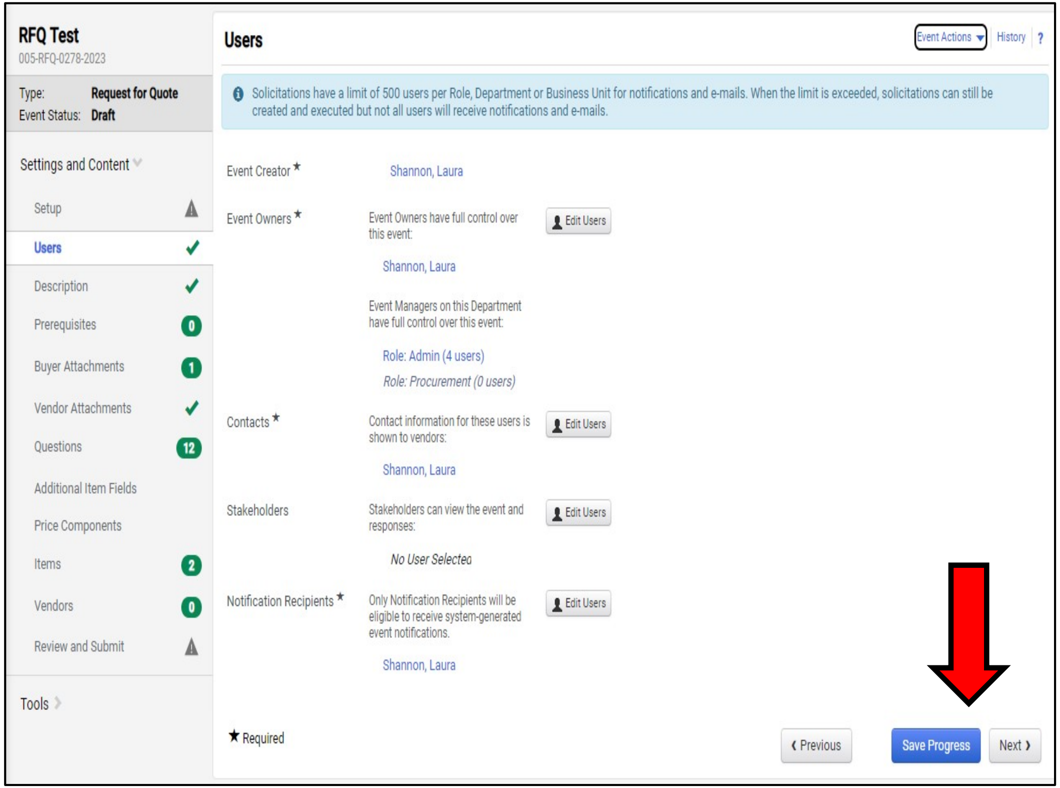
You may delete the selections by clicking the **Remove** button next to the name.

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



Users – Save Progress or Next

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



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Description

Description

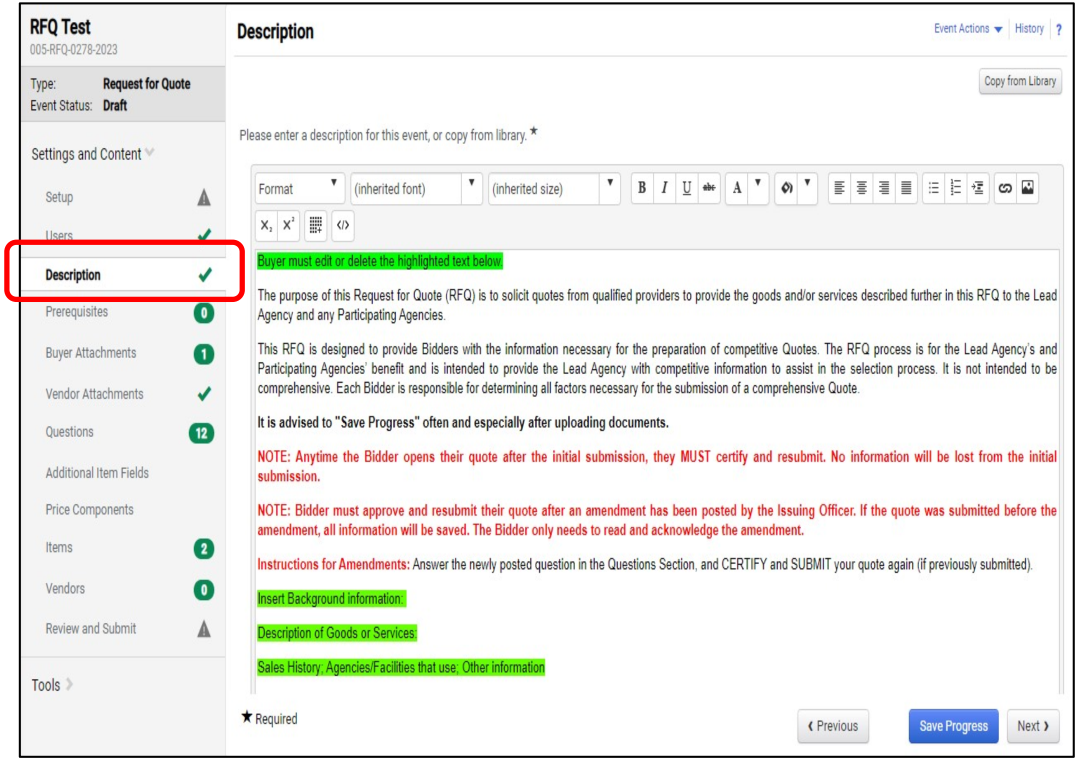
The **Description** Field is filled out with general information.

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.



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Prerequisites

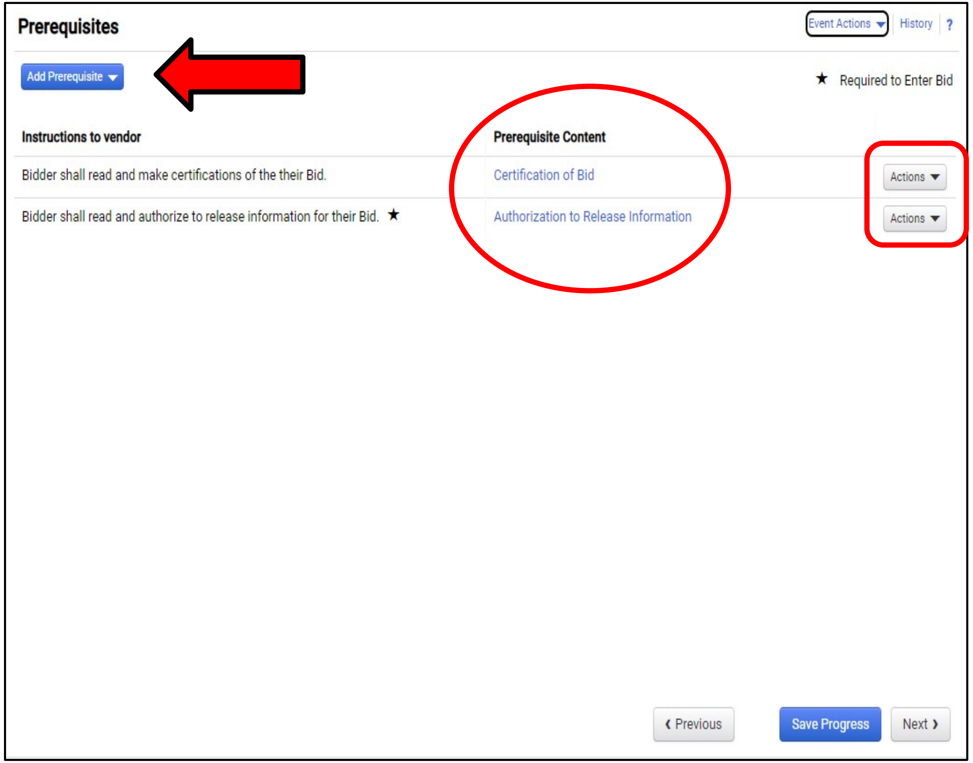
Add, Edit & Delete

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.



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Buyer Attachments

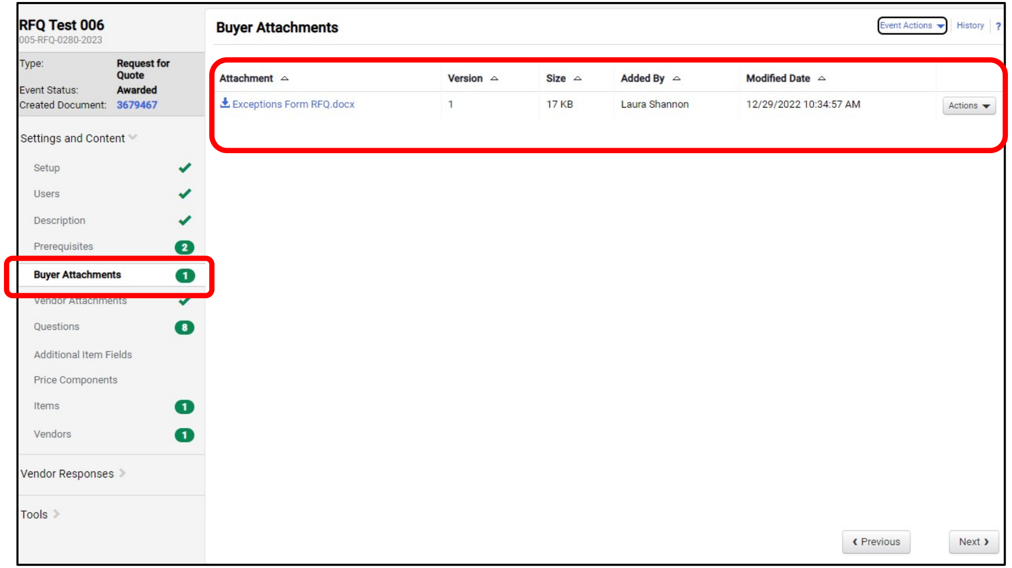
Location for Purchasing Agent/Issuing Officer Attachments to the Bidder

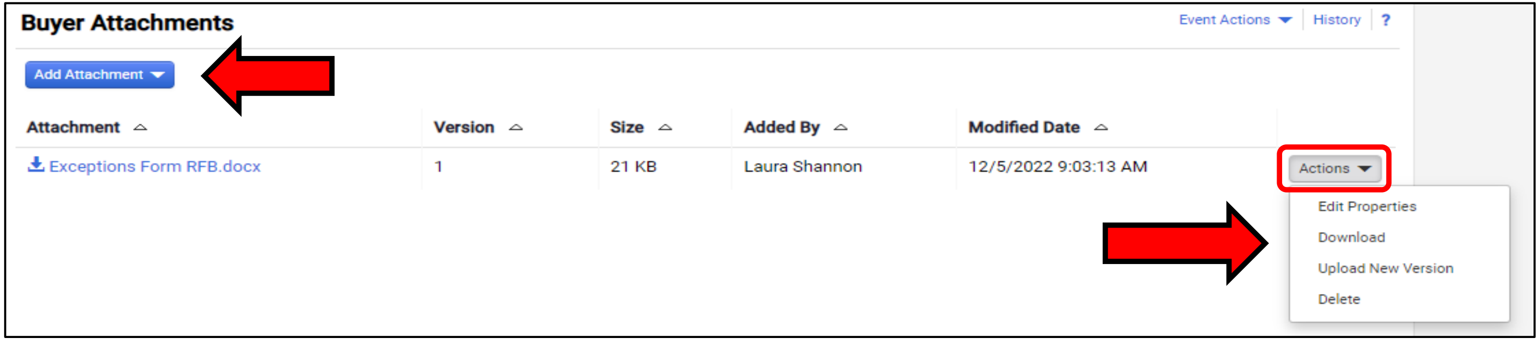
Buyer Attachments

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.





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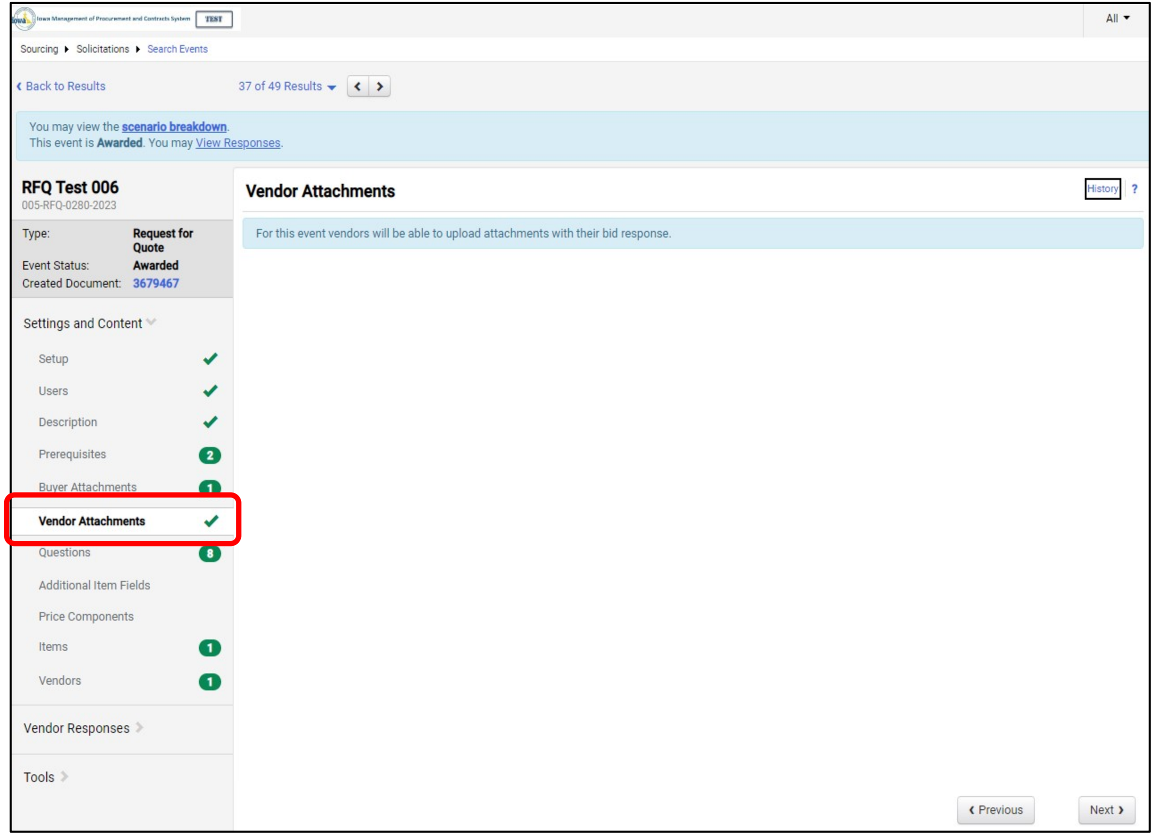
Vendor Attachments

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.



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Questions Section

Overview

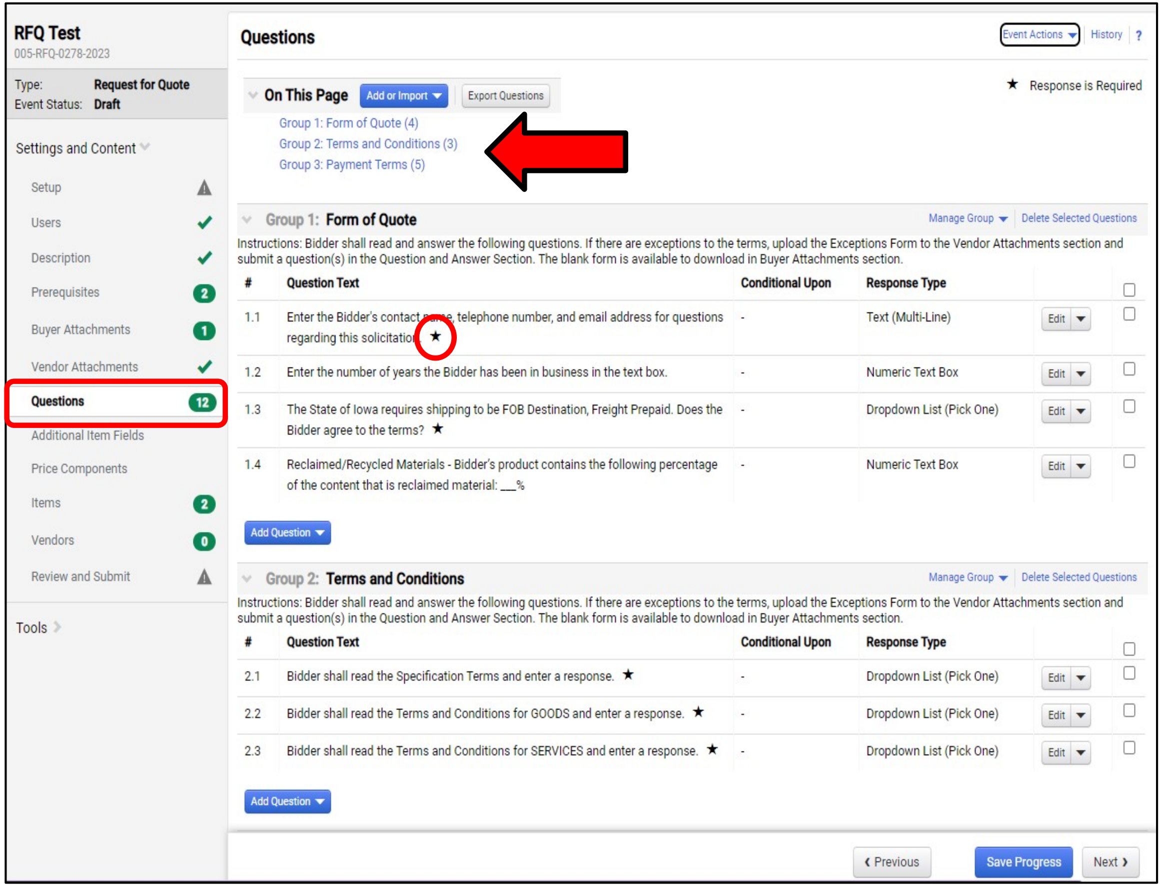
Questions Section

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.

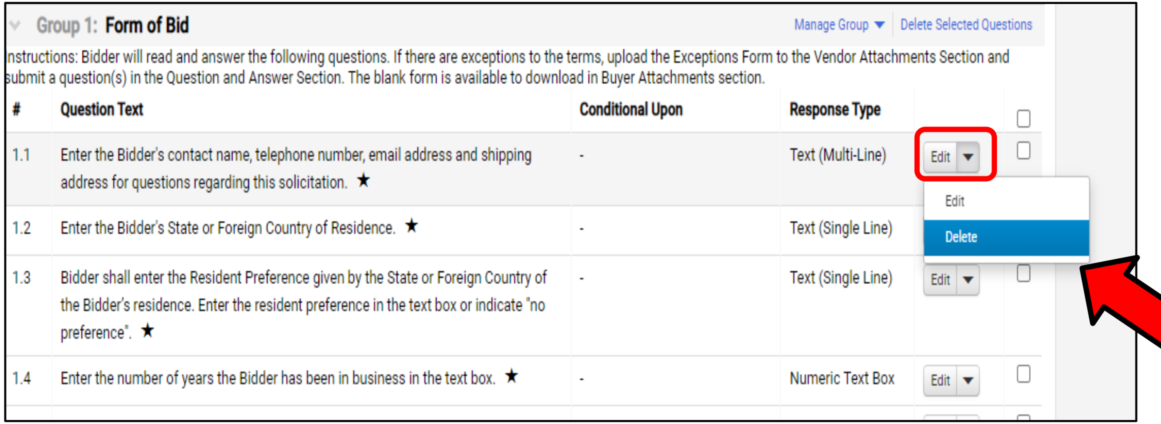


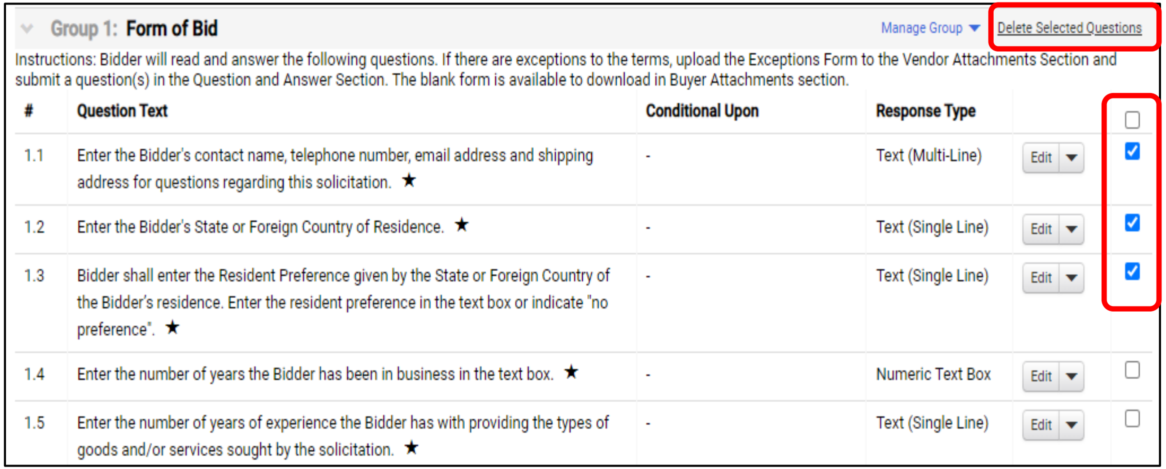
Questions – Edit & Delete

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.





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Additional Item Fields

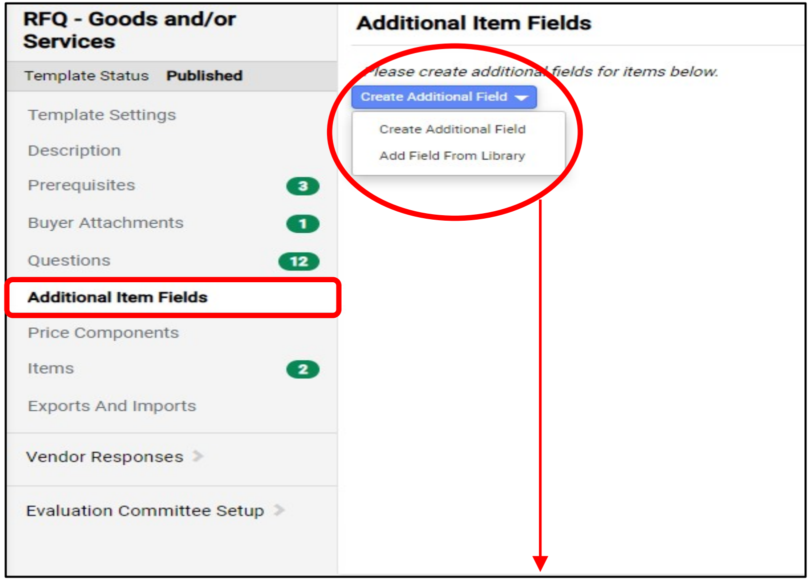
Add Specifications to Bid Items or create your own Item Field

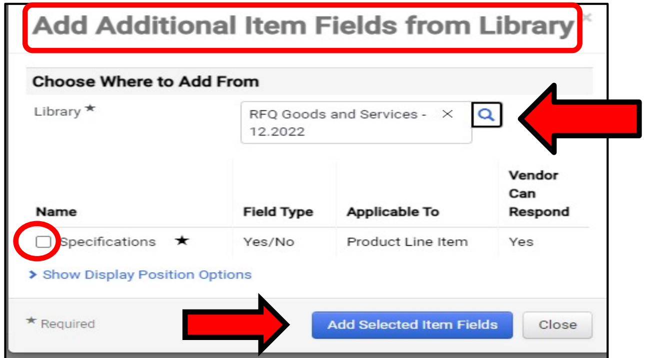
(Optional) Additional Item Fields

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.





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Price Components

(Optional) Price Components

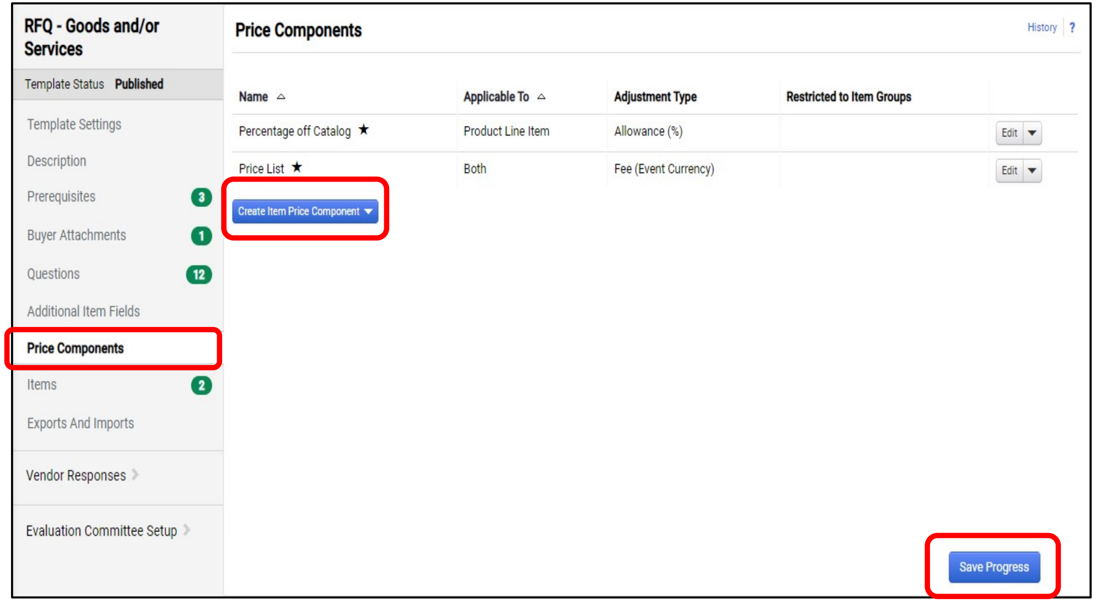
The Buyer may create or edit Price Components for the Items in the Bid.

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



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Items

Product Line Items and Service Line Items

Product Line Items

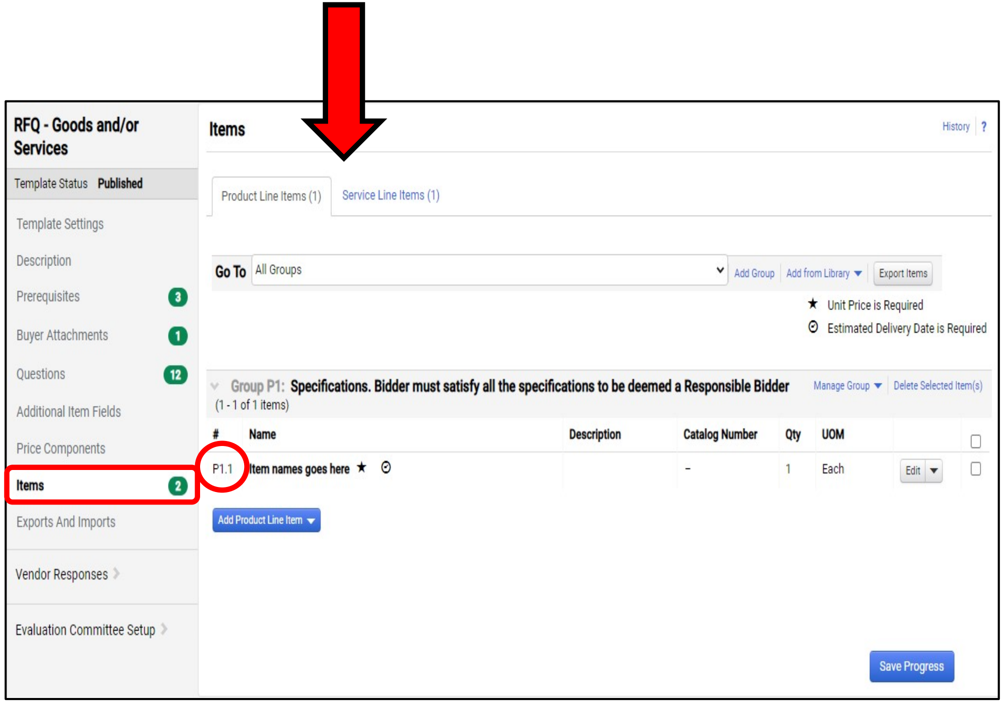
There are two tabs at the top of the Item Page:

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.



Product Line Items - Continued

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

The selections are:

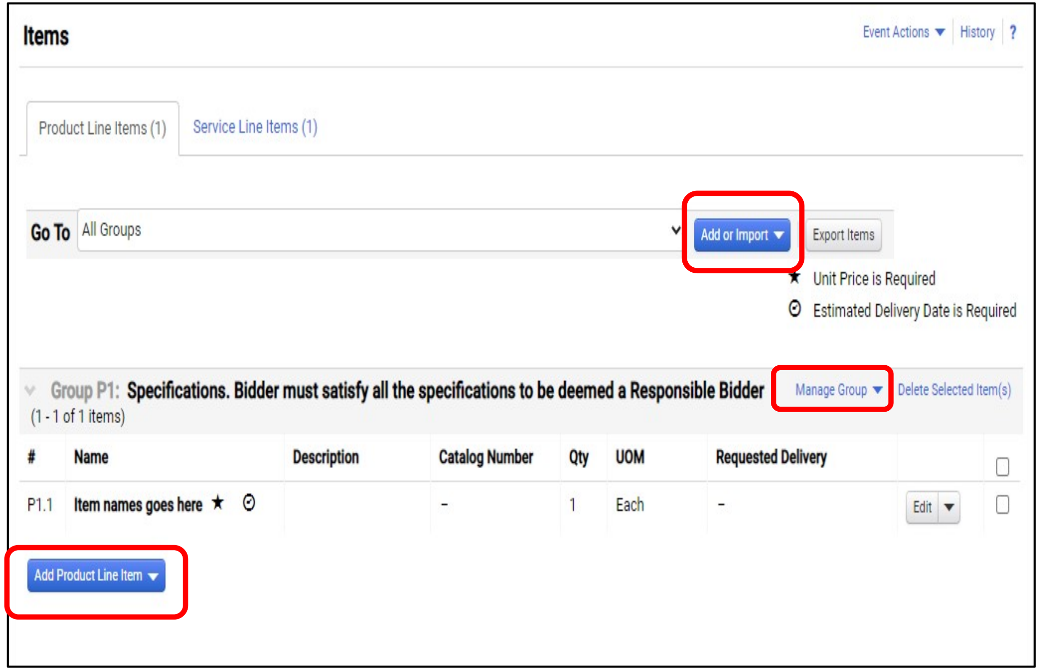
1. Add Item Group
2. Import from Library
3. Import from File (see next page)

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**.

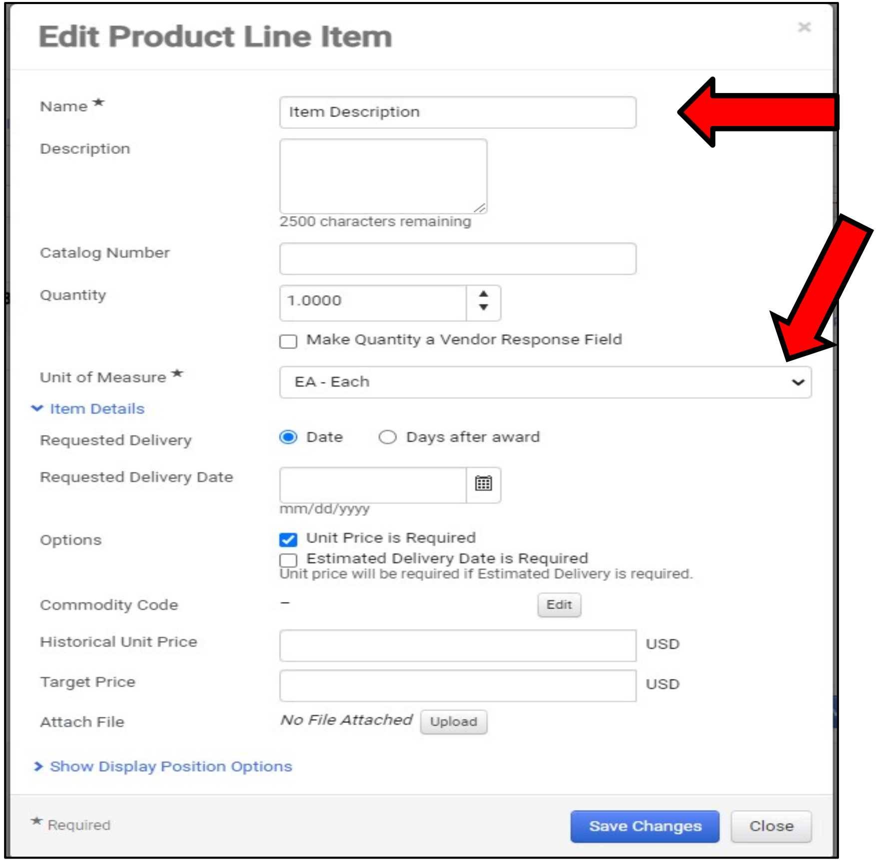


Edit Product Line Item

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

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

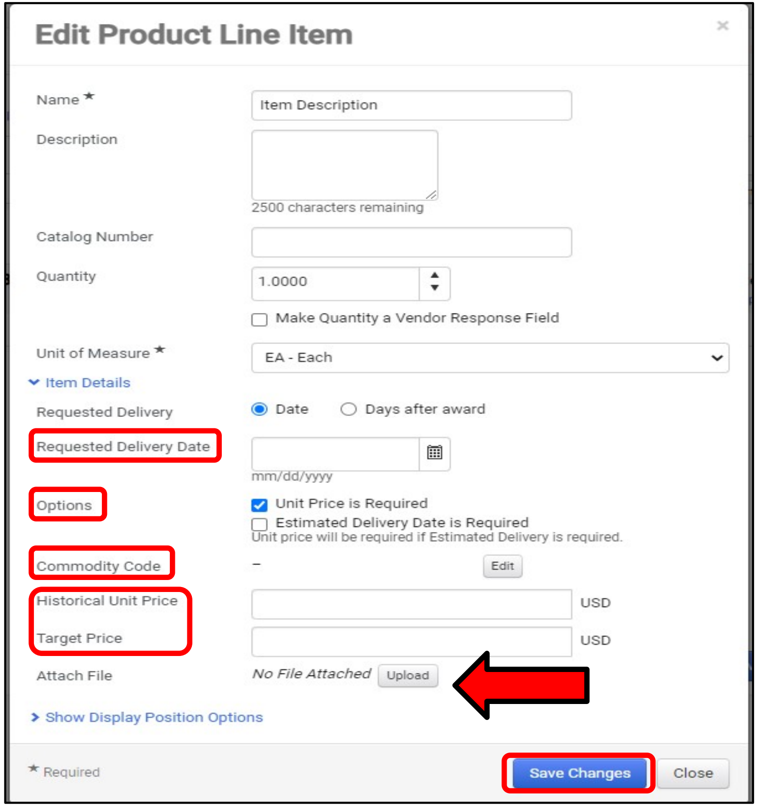
The Buyer may make **Unit Price** and **Delivery Date** Required.

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**.



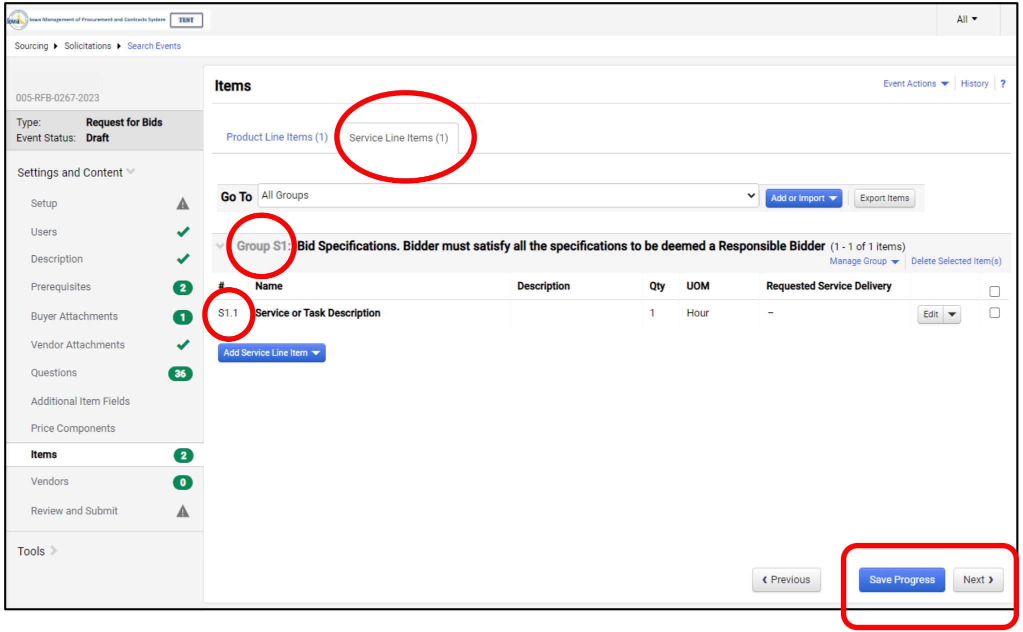
Service Line Item

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**.



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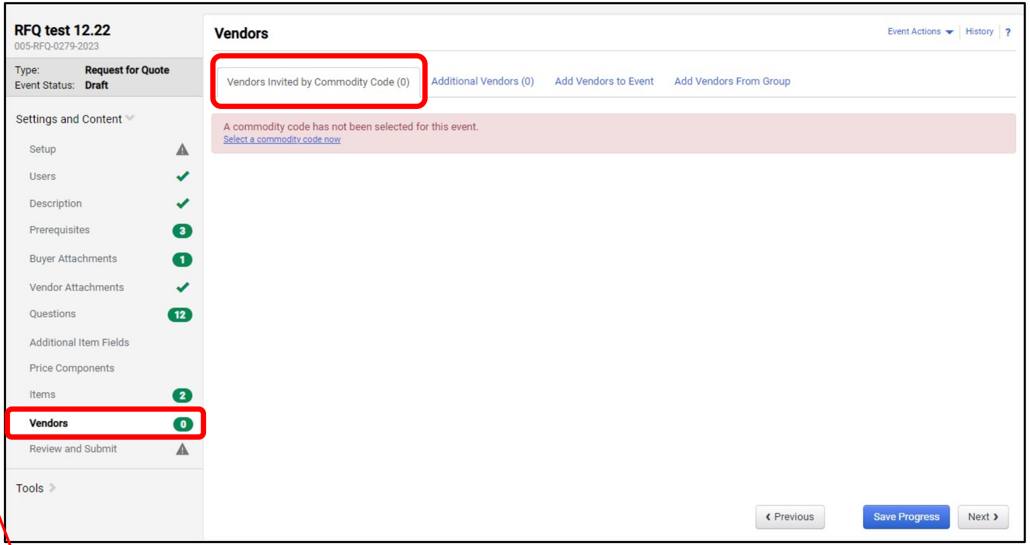
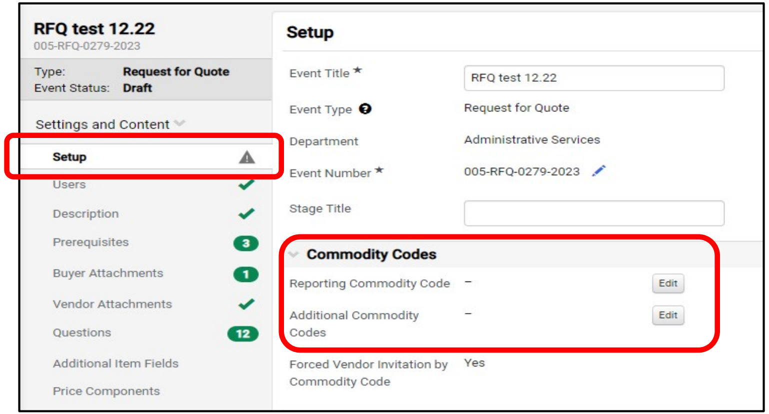
Vendors

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”.



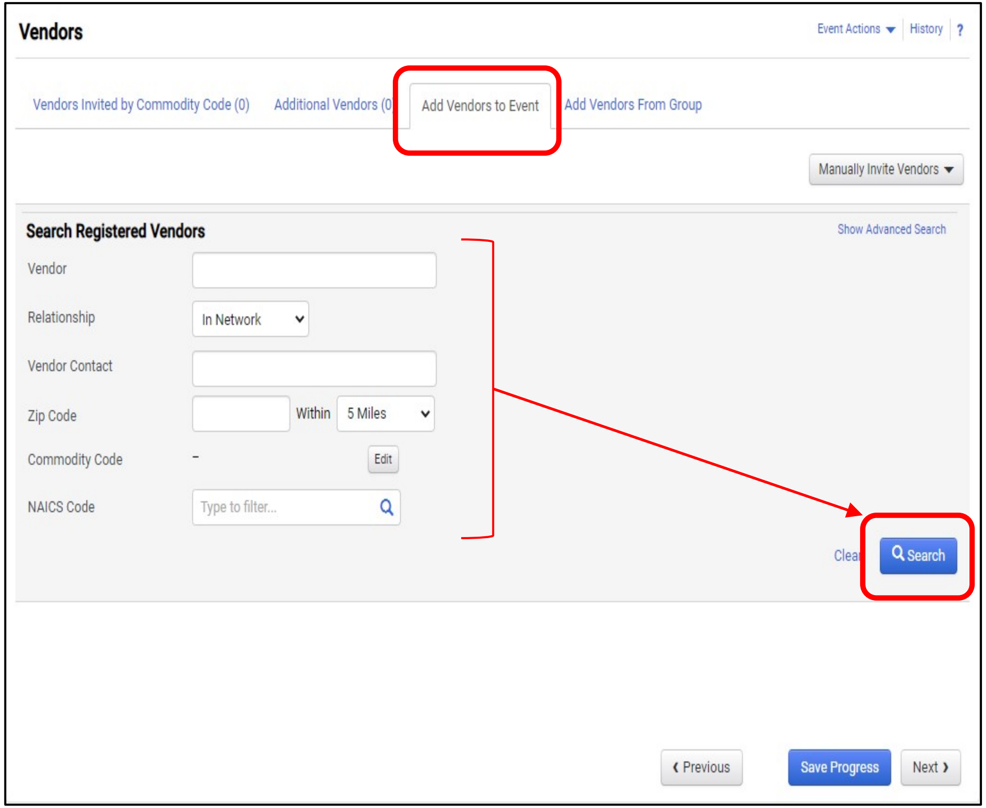


Add Vendors to Event

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

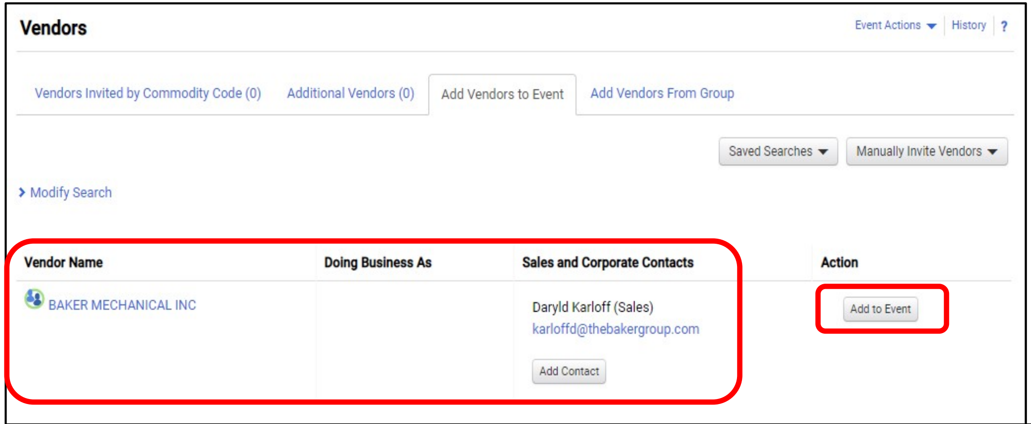
Under the Add Vendors to Event Tab, a Search Window opens that will allow the Buyer to search for Vendors registered in the IMPACS system.

Enter the information and click **Search**.



Manually Invite Vendors

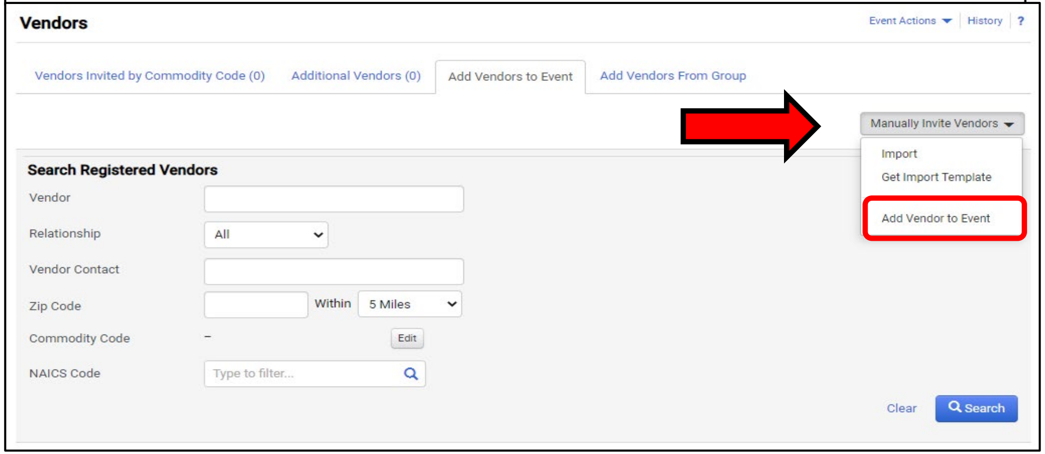
If the Vendor is registered, then the results will show the **Vendor Name** and **Contact** information. Click **Add to Event** to add the Vendor for RFQ posting notification.



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**



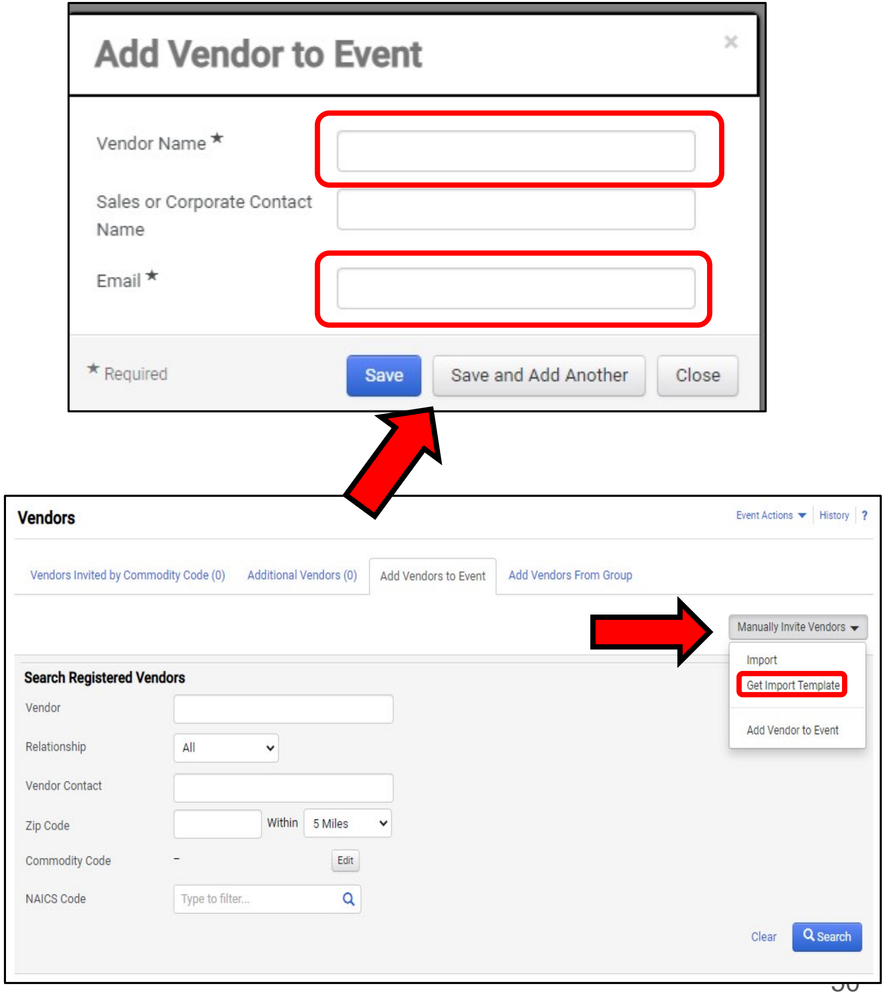
Manually Invite Vendors

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**.

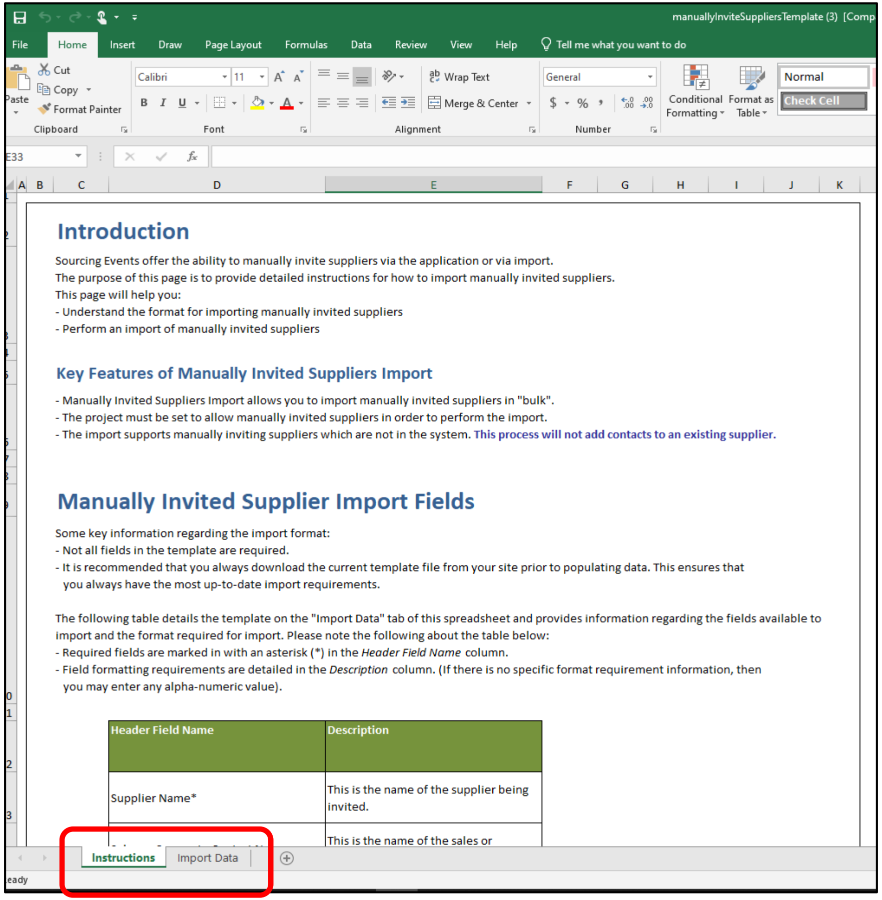
If the unregistered Vendor list is long and the Buyer wants to use a template to import Vendor information into IMPACS then click on the **Manually Invite Vendors** drop-down box.

Select **Get Import Template**.



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).

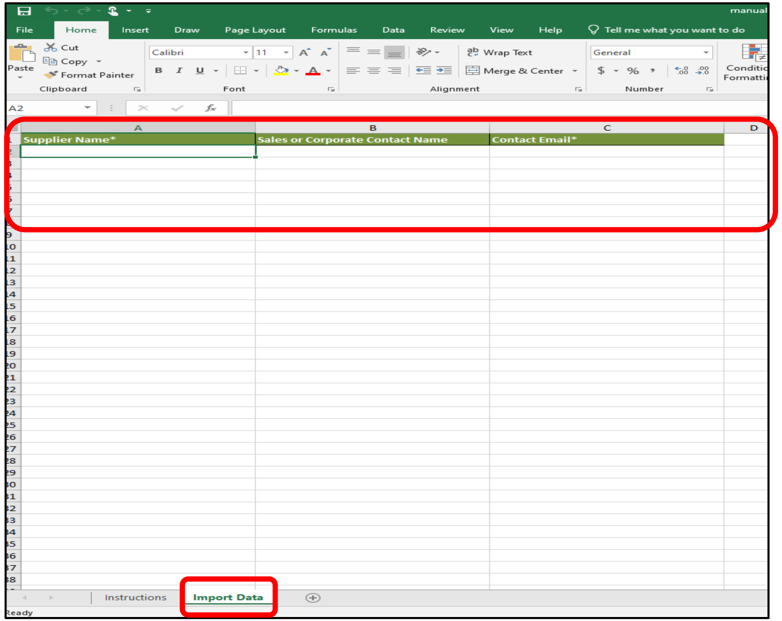


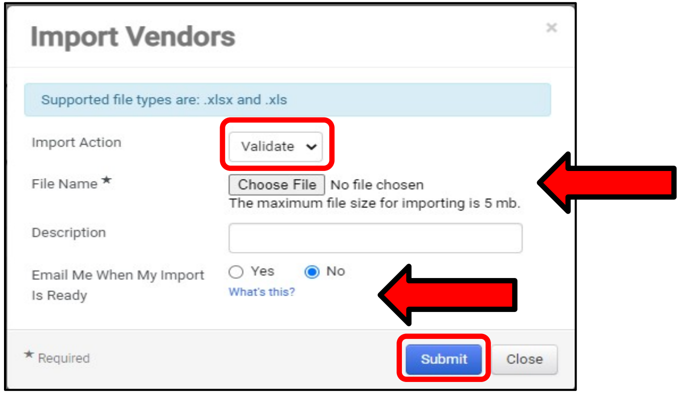
Manually Invite Vendors

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**



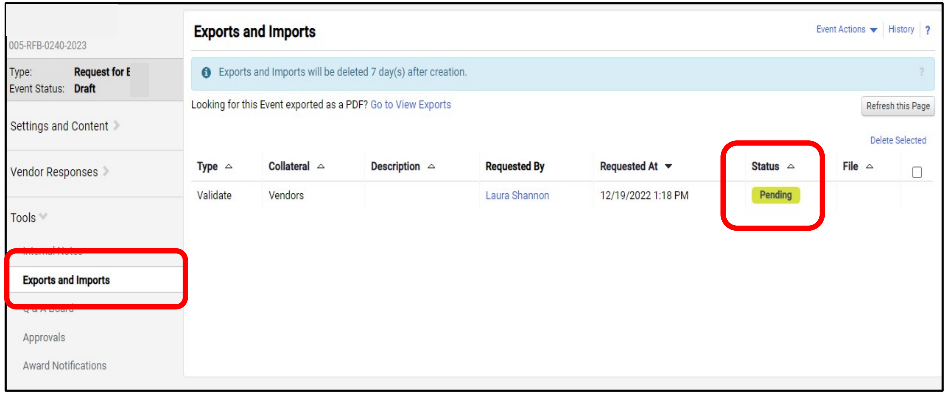


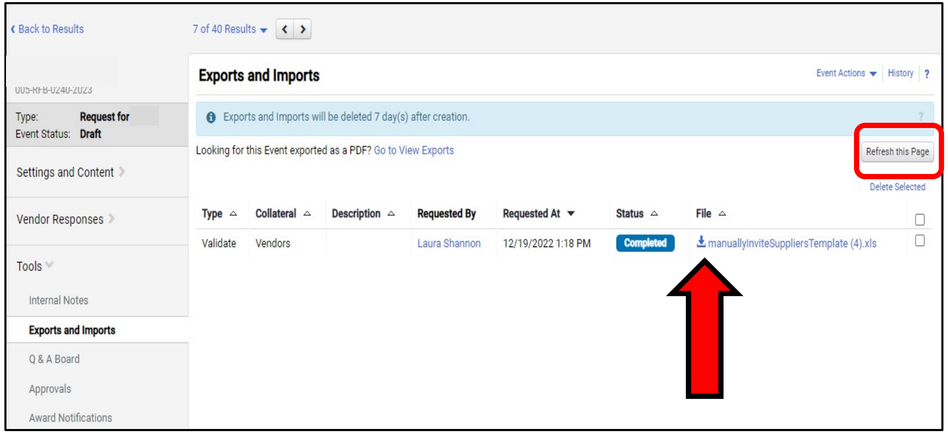
Manually Invite Vendors -Validation of Vendor File

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.





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.**

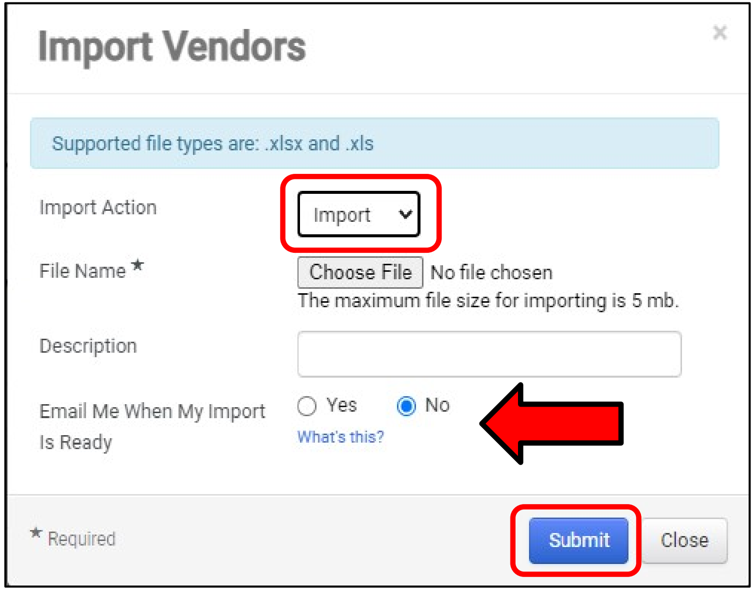
For Import Action, Select **Import.**

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.**

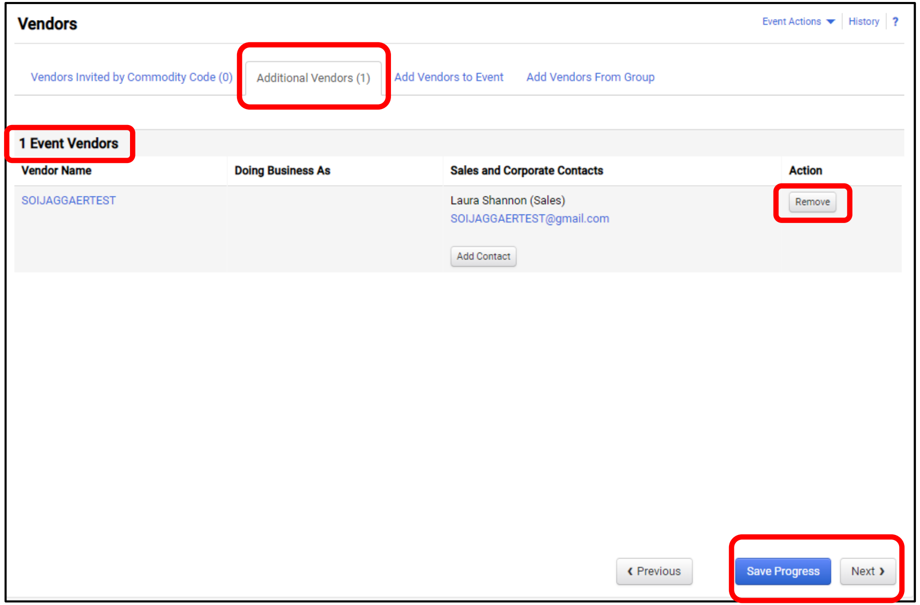


Additional Vendors

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**.



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Review and Submit

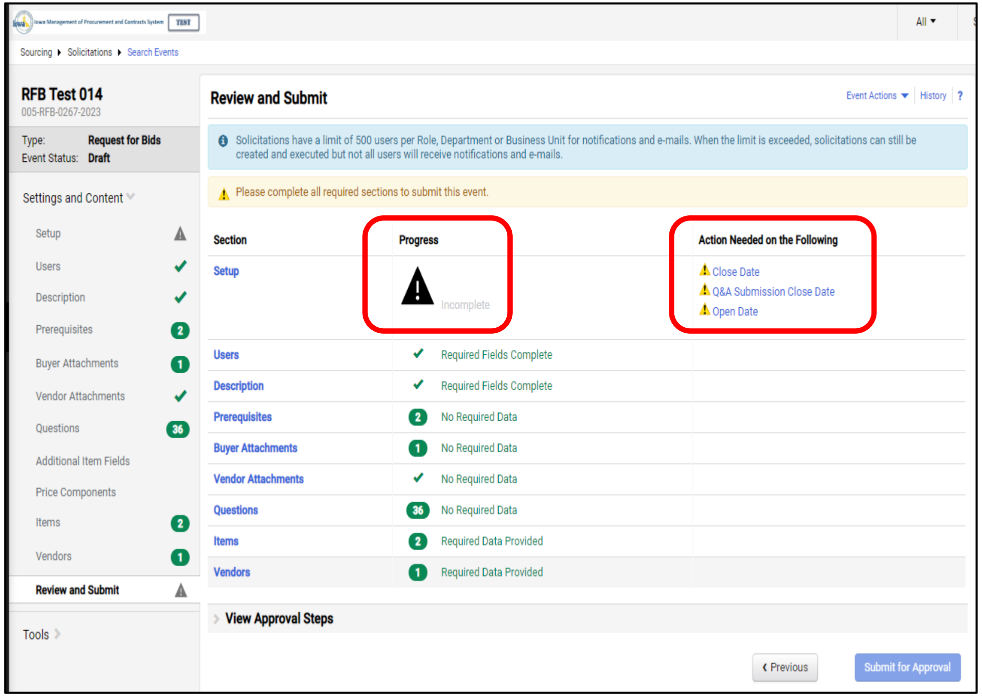
Errors and Approval

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.

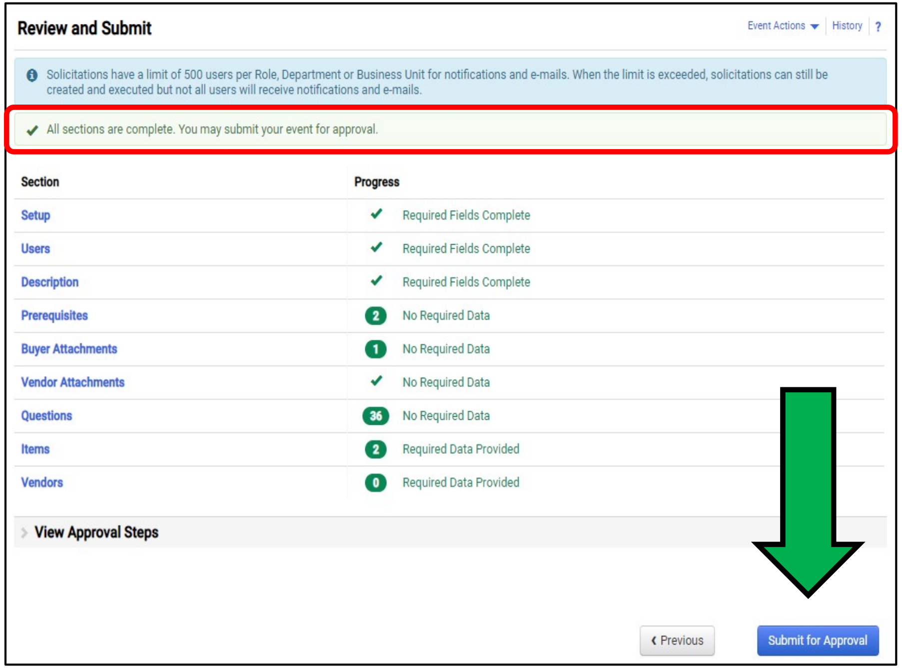
After the error is corrected, be sure to **Save Progress** on that page.



Review and Submit

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

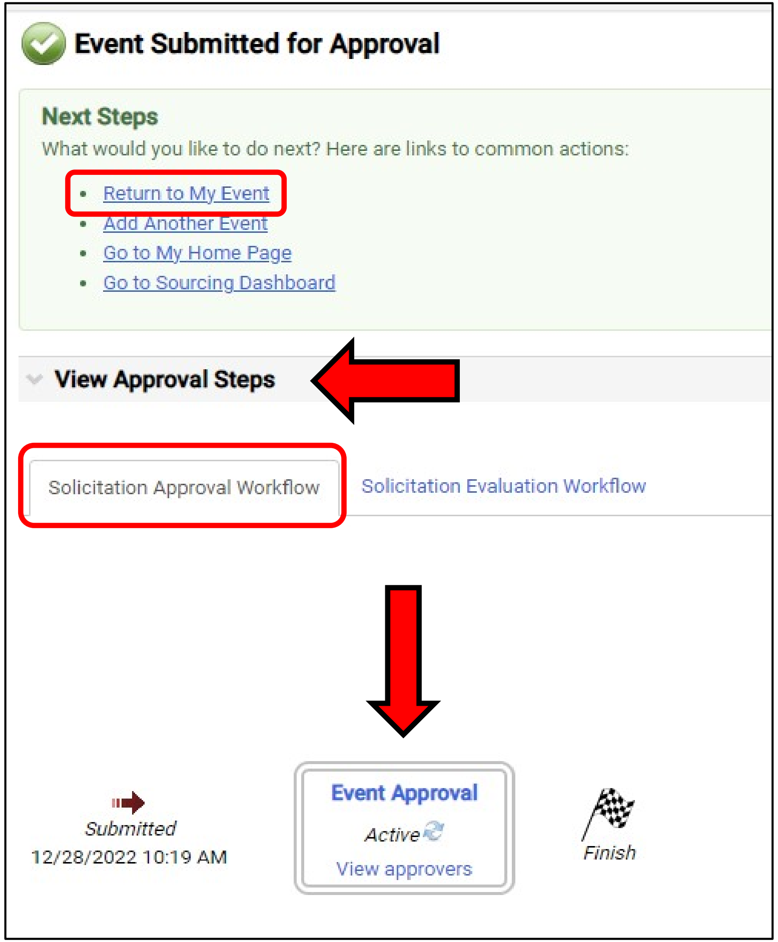
The RFQ will enter the approval workflow and the approver will either approve or send the RFQ back for revisions.



Approval

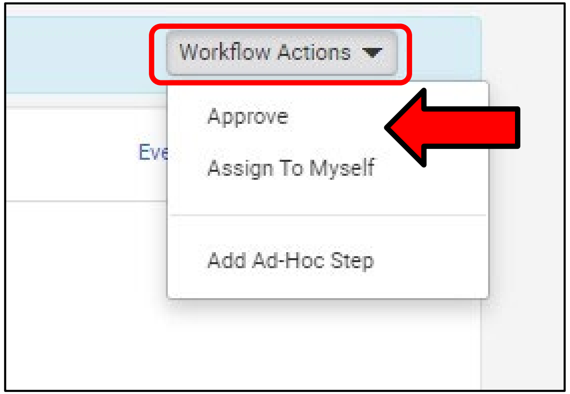
The Buyer may view the Approval Workflow by expanding the **View Approval Steps** tab. If the Buyer has an Approver assigned to them, then the RFQ will go live on the date indicated on the setup page after the Approver has approved the RFQ.

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



Approval

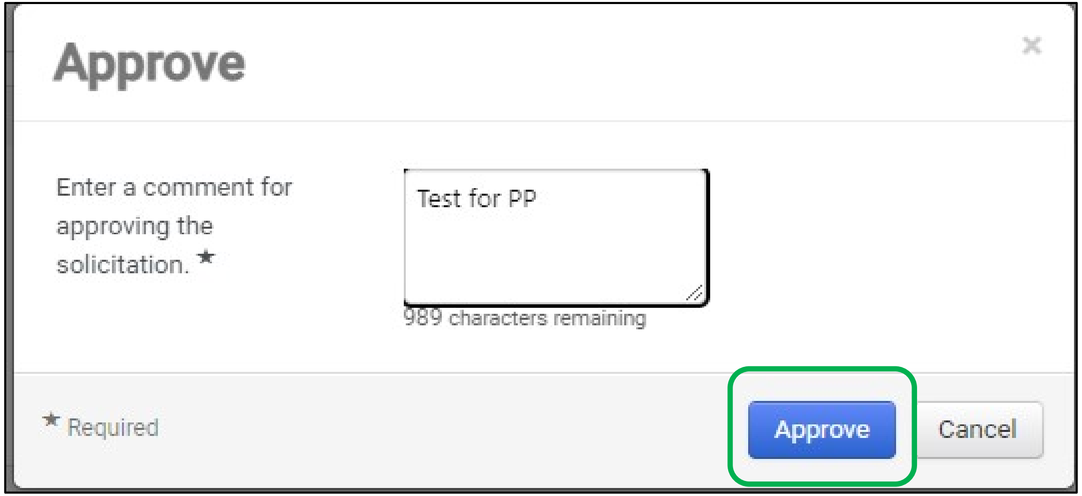
After returning to the RFQ Event, click on the **Workflow Actions** dropdown box in the upper right portion of the screen and select **Approve** (some Buyers might need to **Assign To Myself** depending on their permissions).



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.



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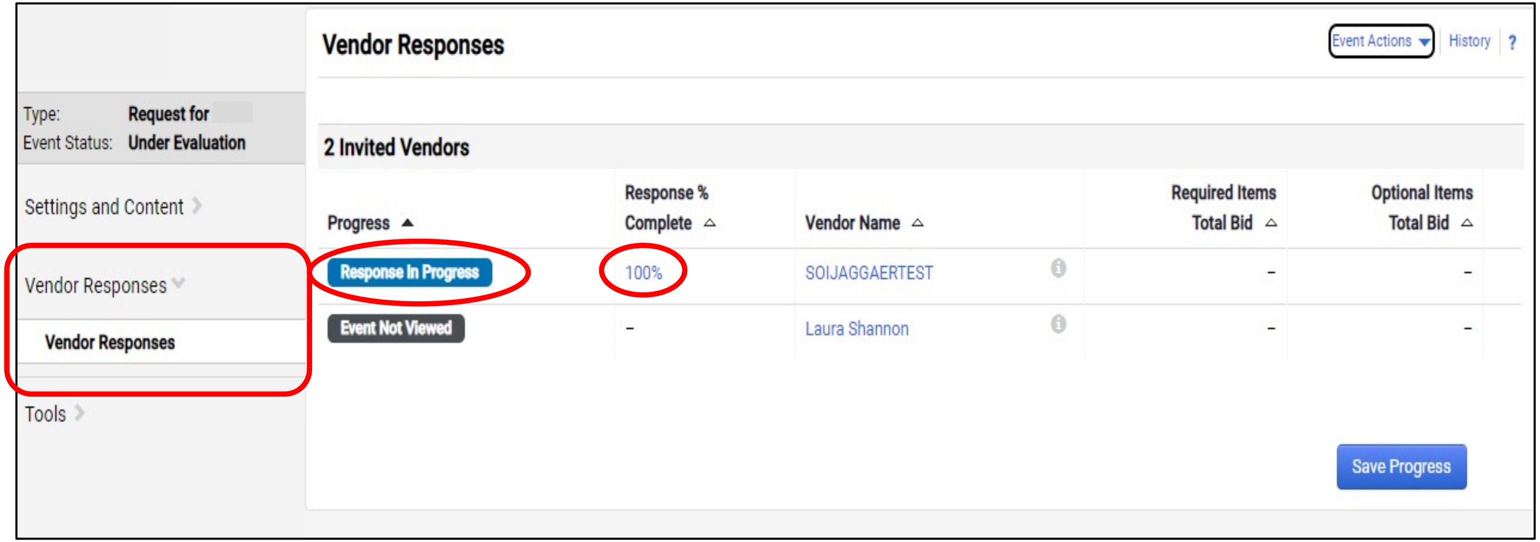
Vendor Responses

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**.



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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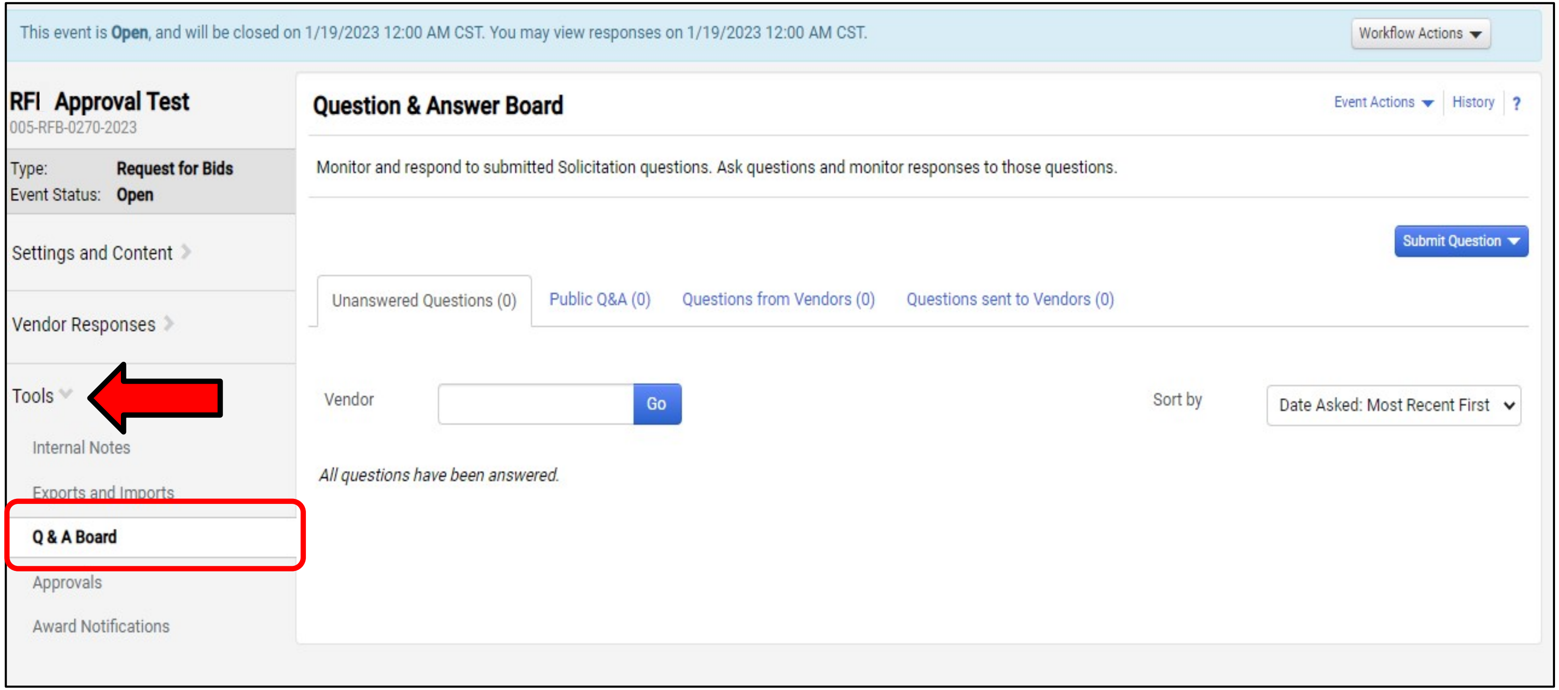
Tools

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.

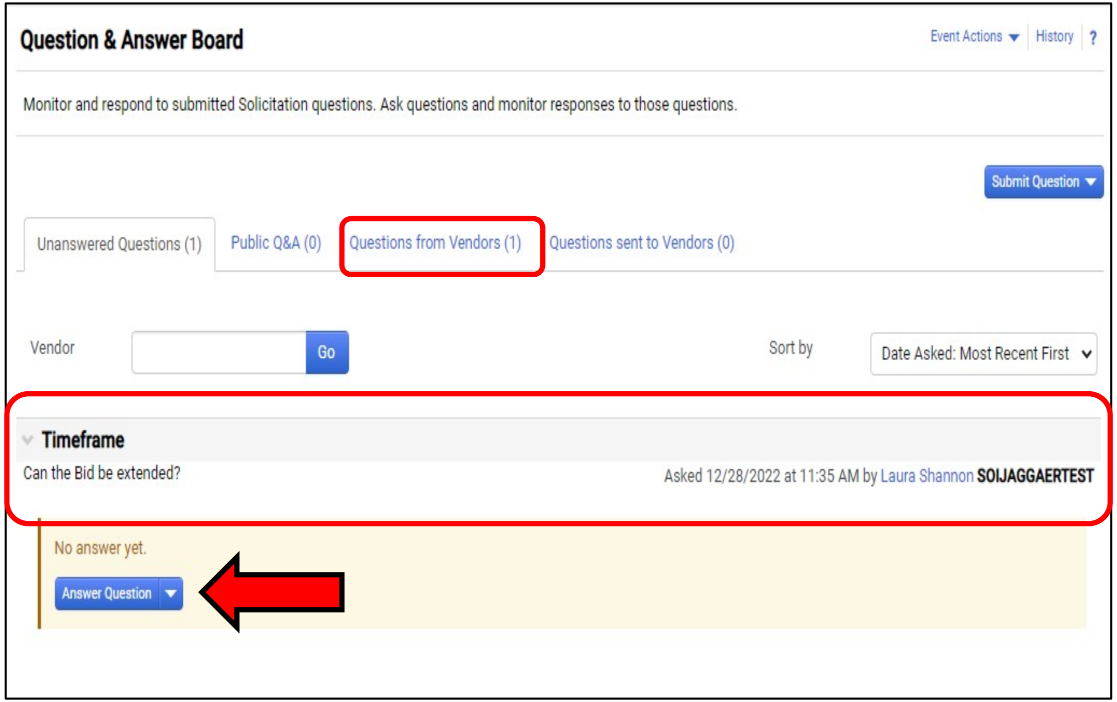


Question & Answer Board

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.

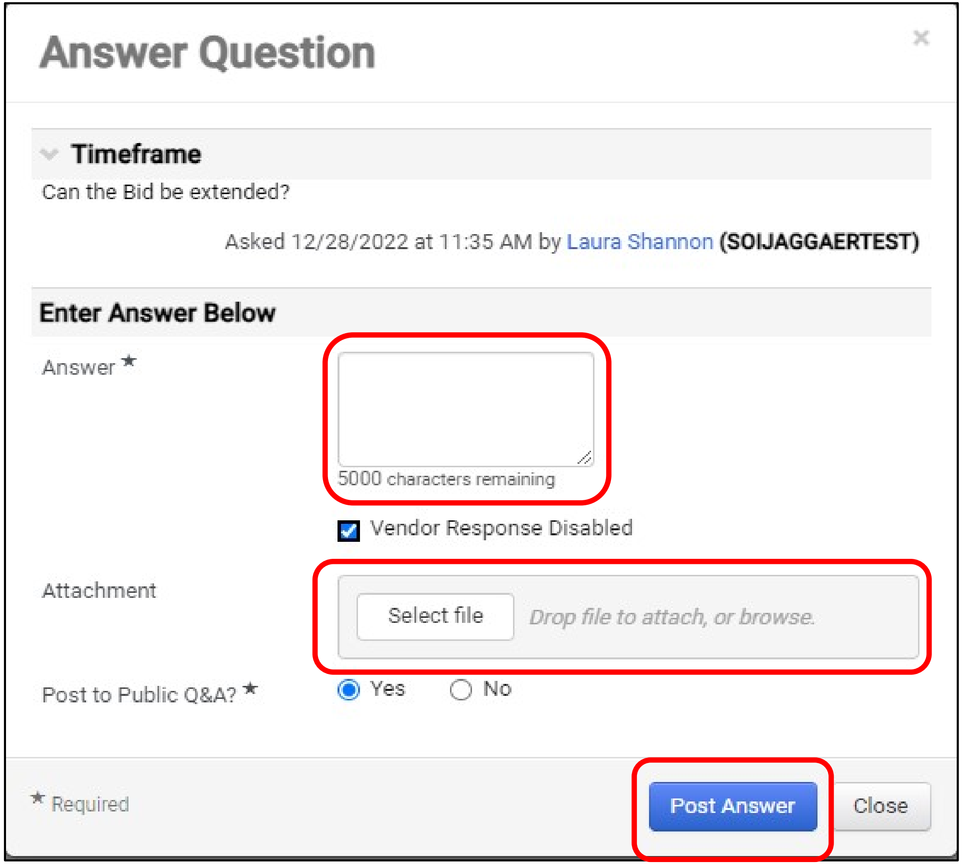


Question & Answer Board – Answer Question

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**.



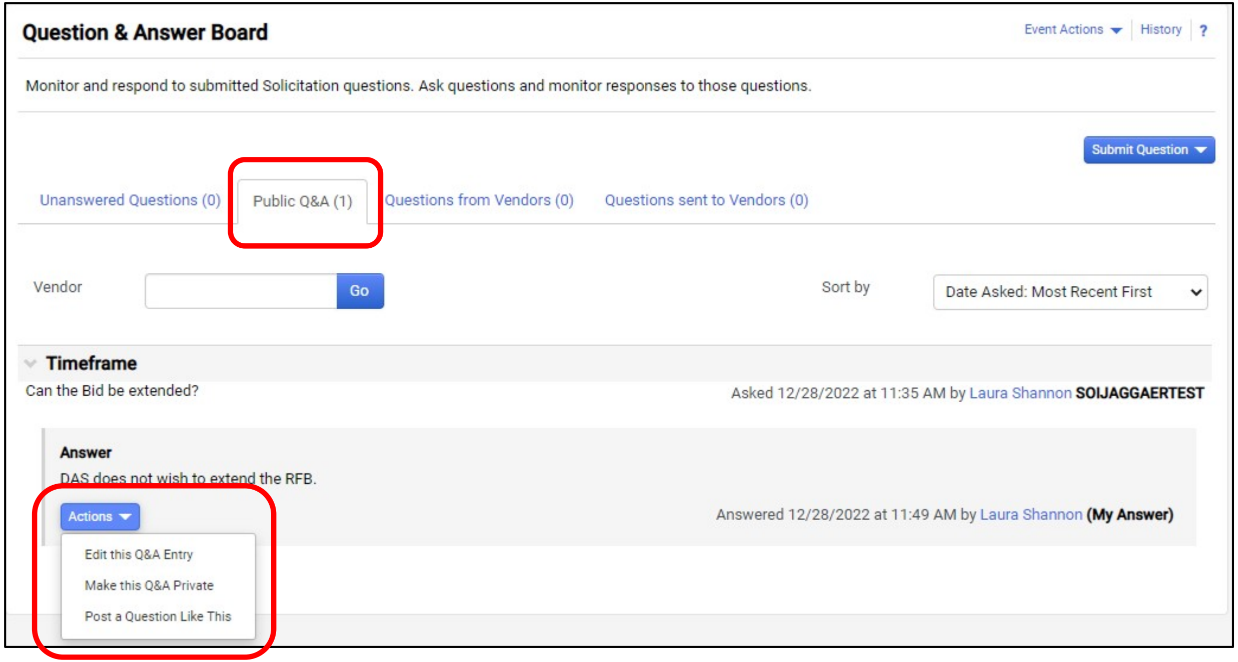
Question & Answer Board – Answer Question

Once the answer is posted, the Buyer may:

Edit the answer,

Make this Q&A Private, or

Post a Question Like This.



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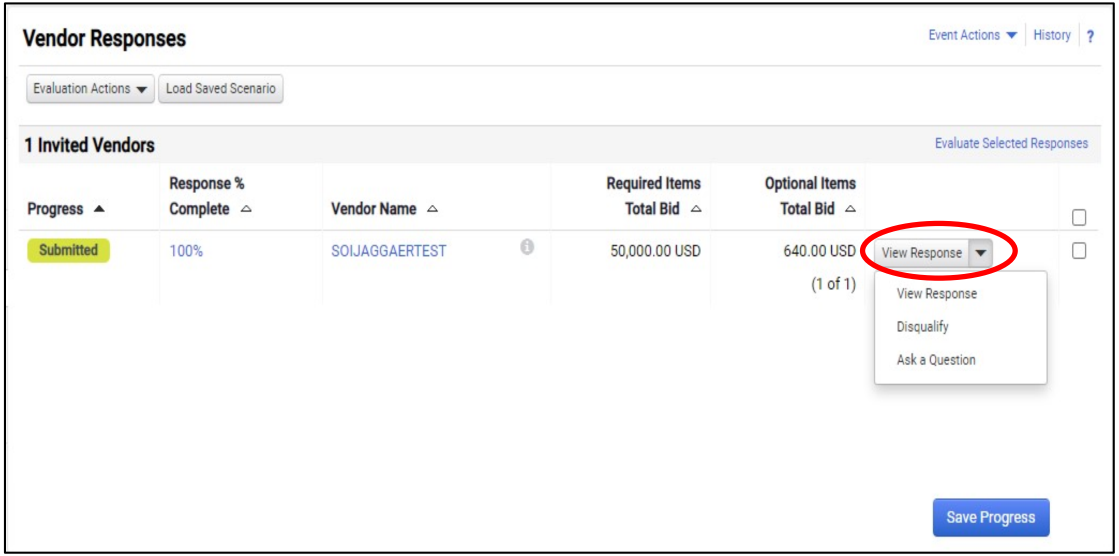
Evaluation

Award Actions

Evaluation

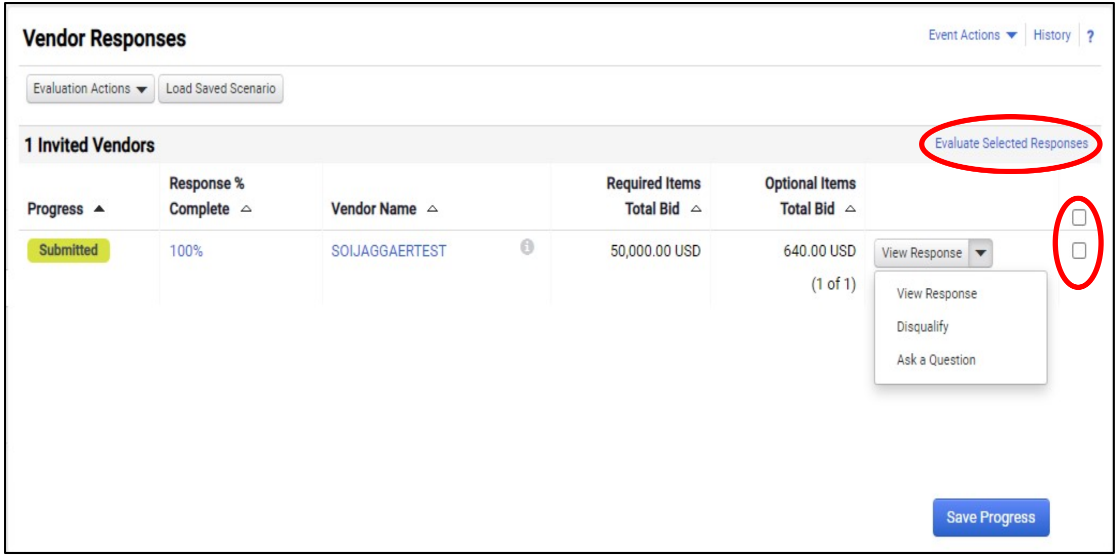
From the **Vendor Response** screen, select **View Response**. This is a quick way to **VIEW (not evaluate)** the responses from individual Bidders.

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



Evaluation

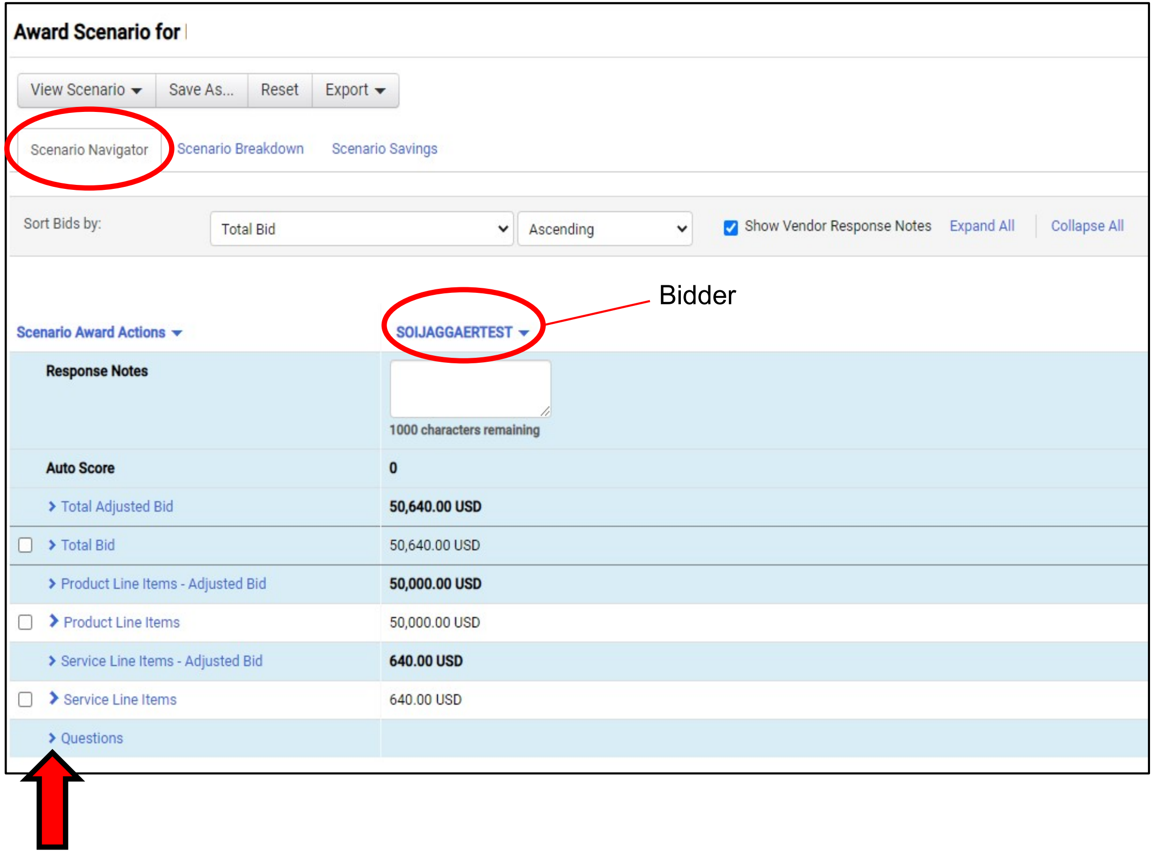
To Evaluate the responses, check the boxes next to the responsive Bidders and select **Evaluate Selected Responses**.



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.

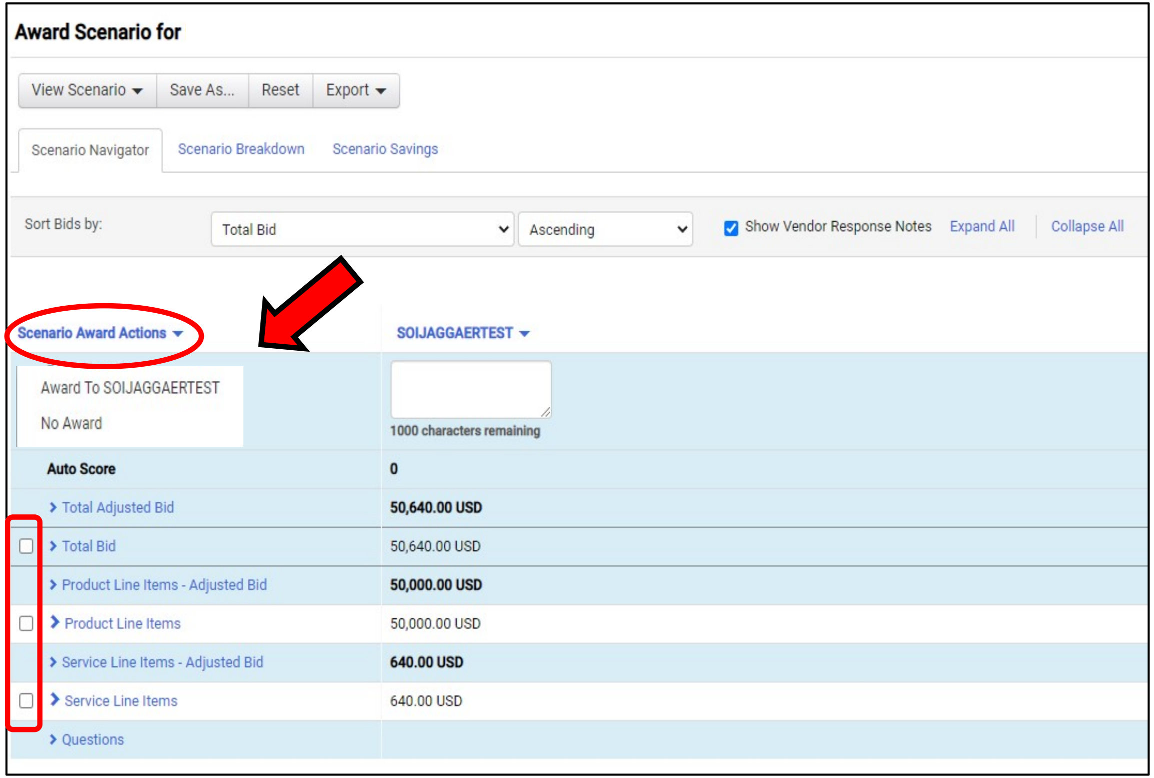


Evaluation

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.



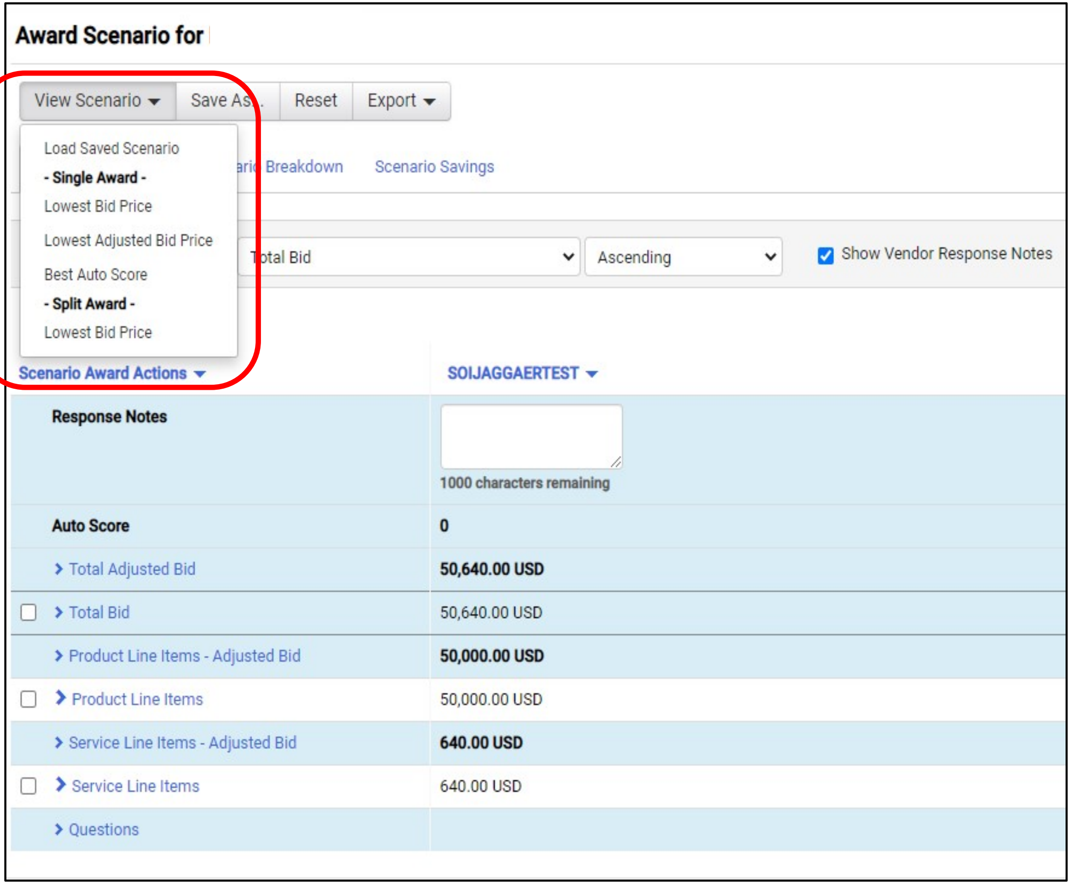
Evaluation – Using Scenario

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;

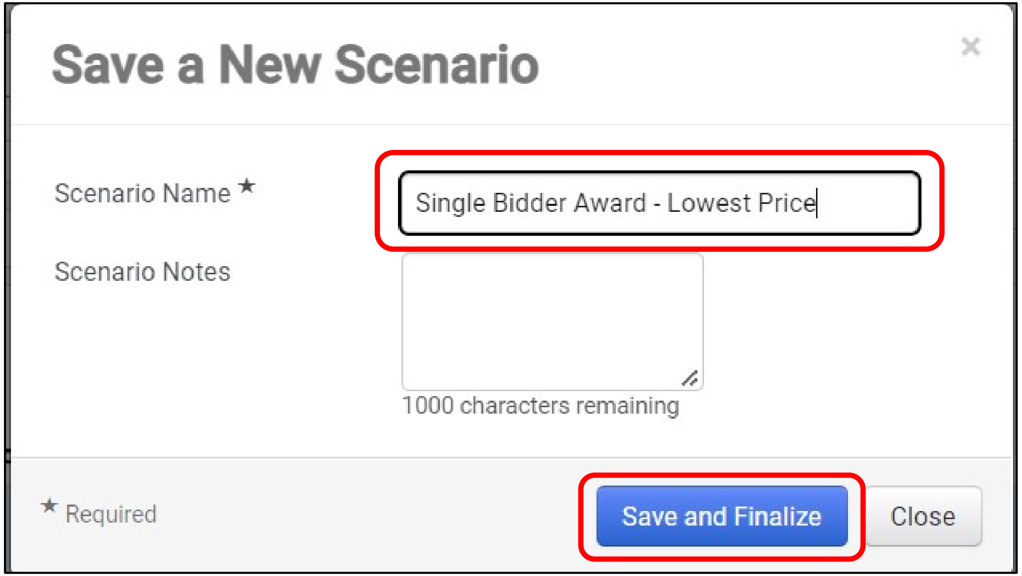
Award to a single Bidder with the lowest adjusted price.



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.

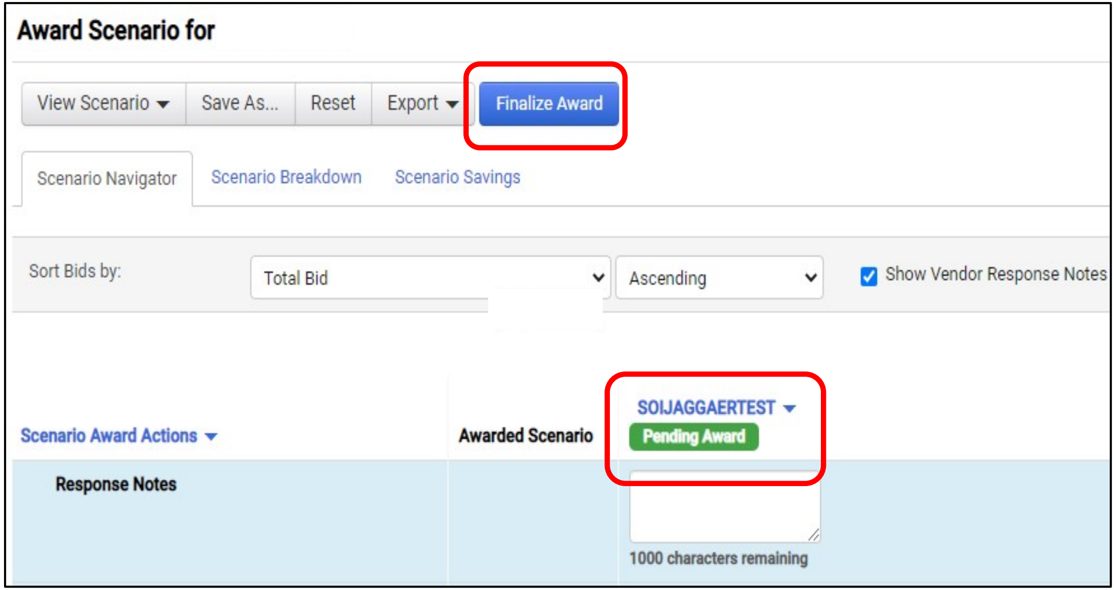
The Buyer names their scenario and selects Save and Finalize.



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**.

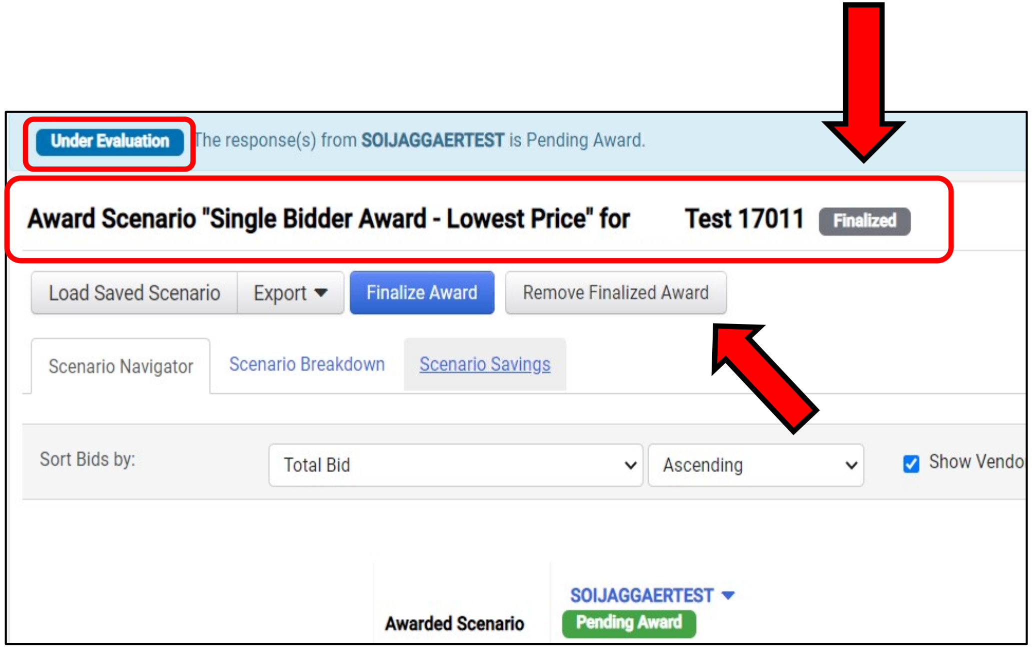


Evaluation – Using Scenarios

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.



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Award Notifications

Award Notifications

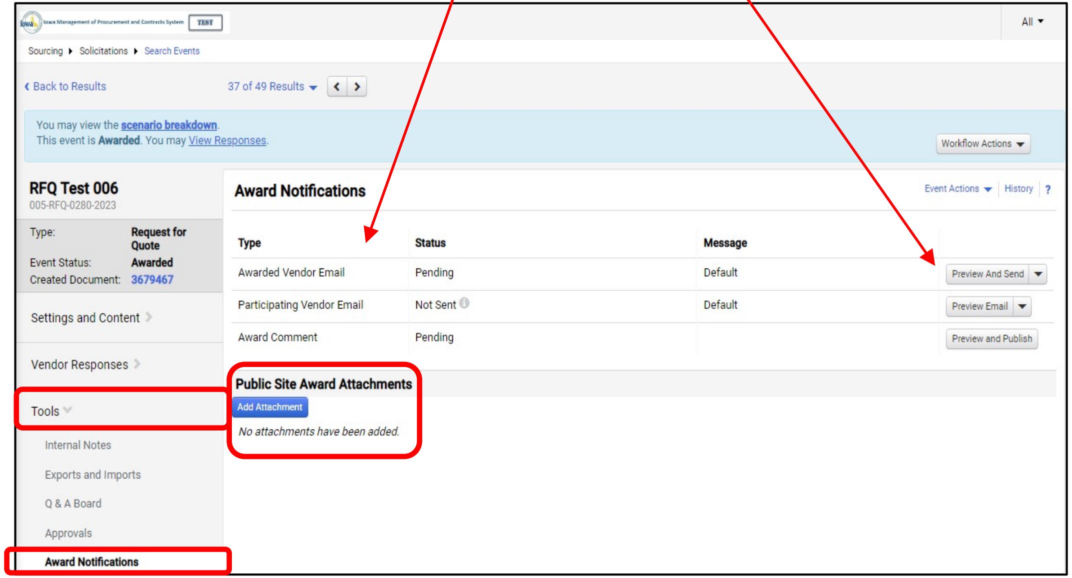
See **Tools>Award Notifications>Public Site Award Attachments** to post your Notice of Intent to Award (NOIA). A template for the NOIA can be found in the Award Notifications Email section or see next slides. If using the IMPACS template, copy the language and replace the placeholders.

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



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=DASIowa) 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:

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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

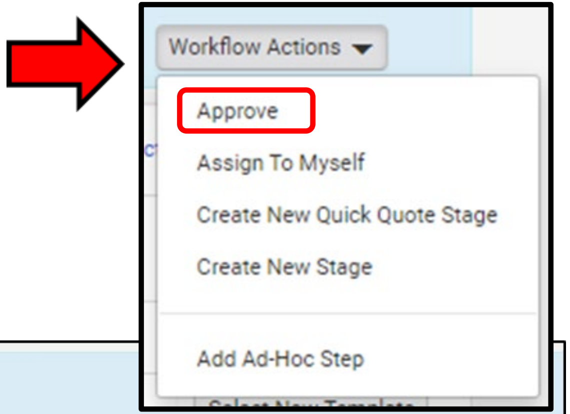
After the appeal period has ended, navigate to **Workflow Actions** and select **Approve**. The Pending Award Vendor is now Awarded.

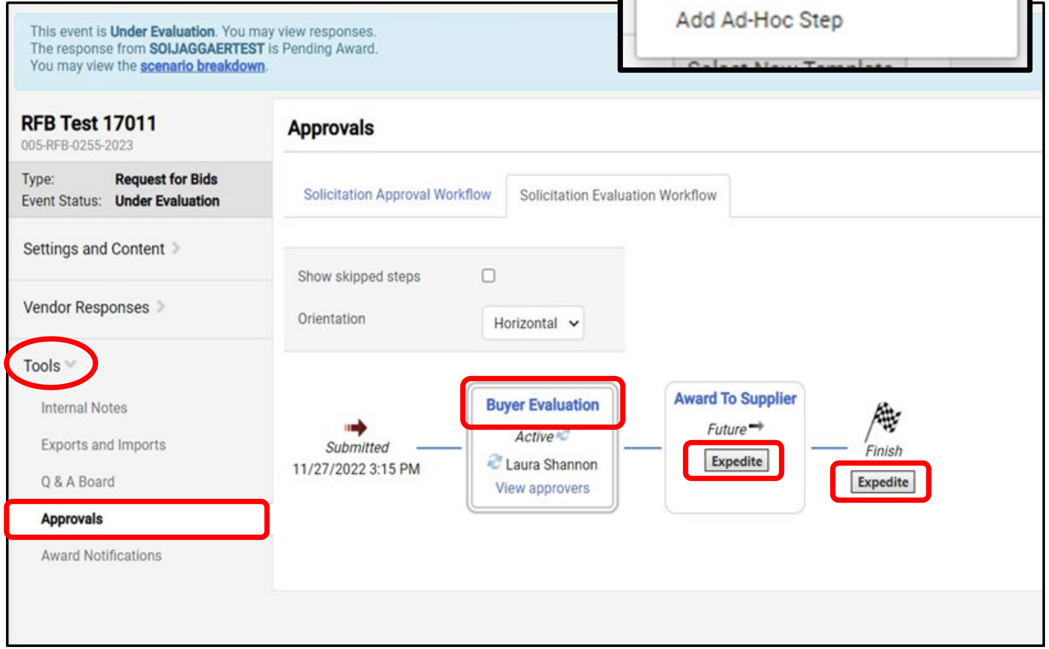
If the Buyer has an Approver, then the Buyer shall notify the Buyer's Approver that they can now approve. The Approver shall navigate to the Approval tab in the wizard. They can Approve from their Dashboard or open the solicitation. If opening the solicitation:

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.

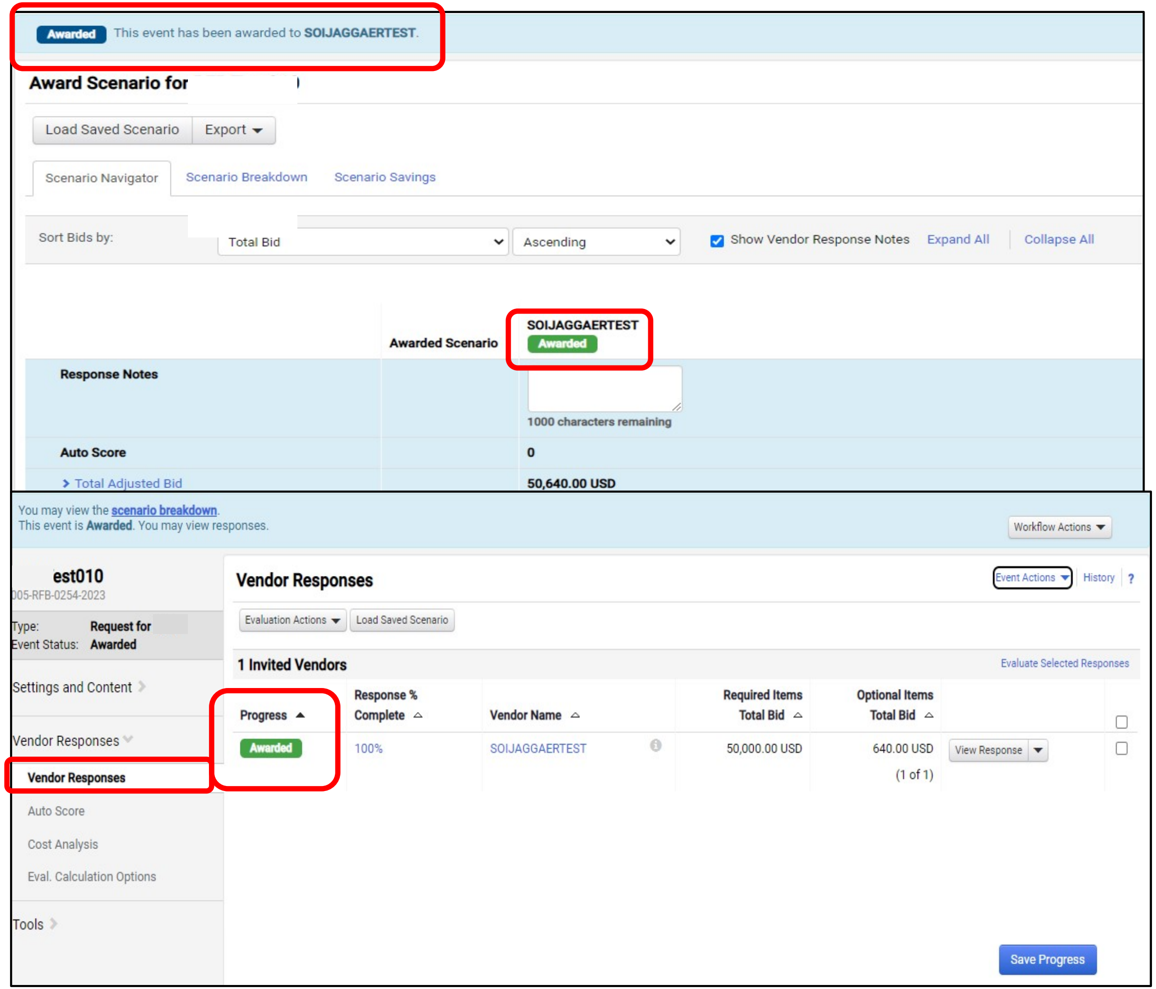




Award

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.



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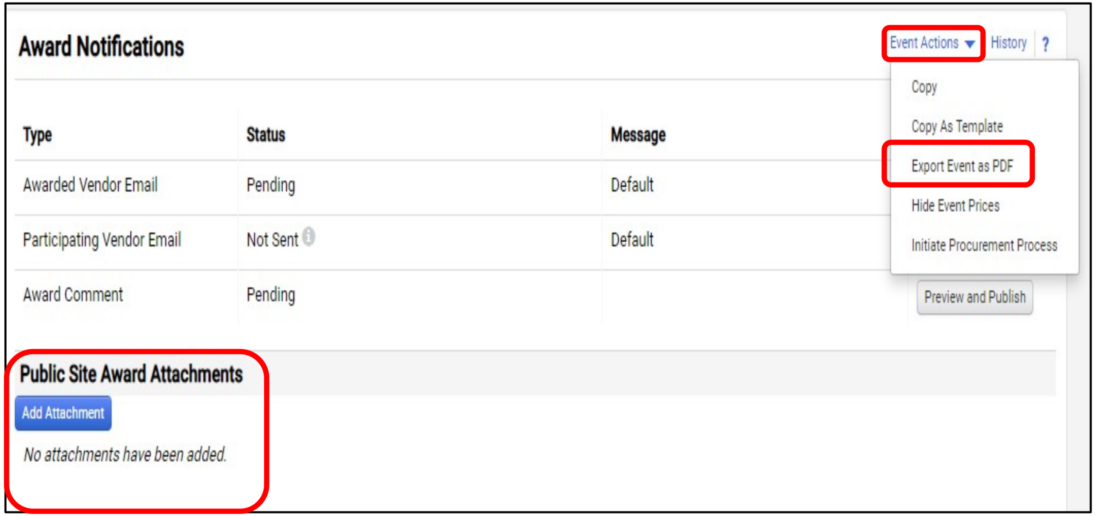
Export and Publish

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.



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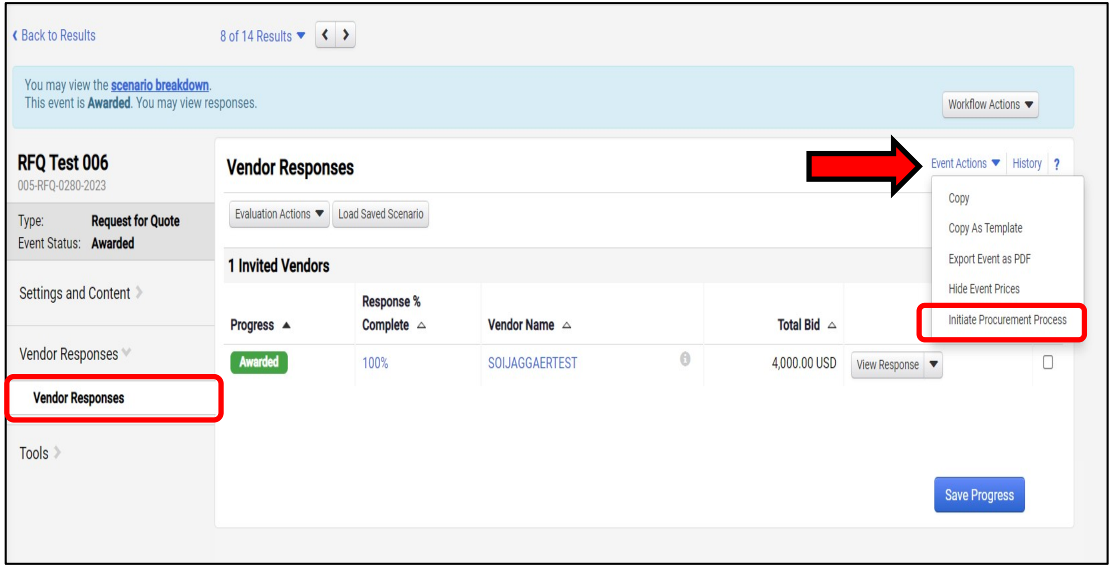
Initiate Procurement Process

Initiate Procurement Process

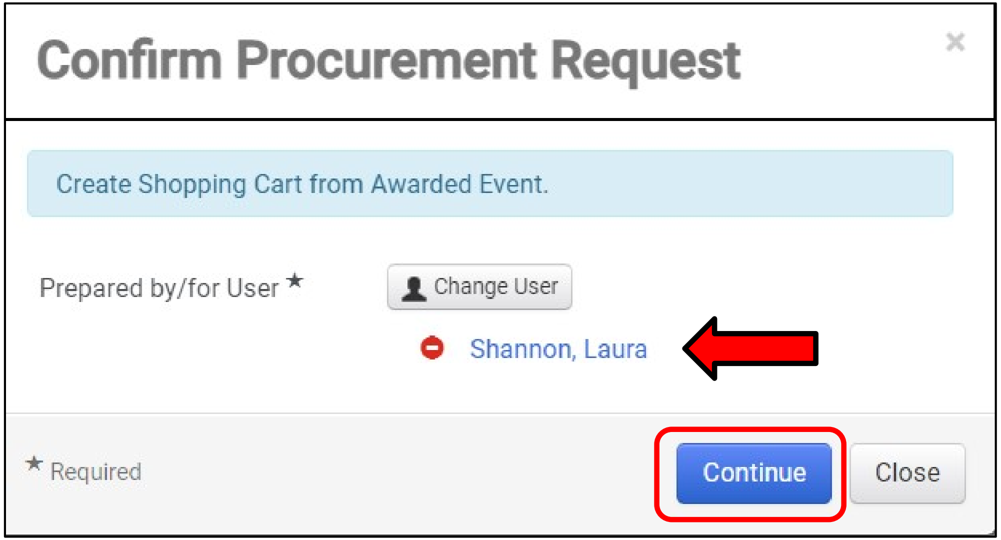
To create a purchase requisition from the RFQ, navigate to Vendor Responses Wizard and click on the **Event Actions** dropdown menu and select **Initiate Procurement Process**.



Initiate Procurement Process

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

When done select **Continue.**



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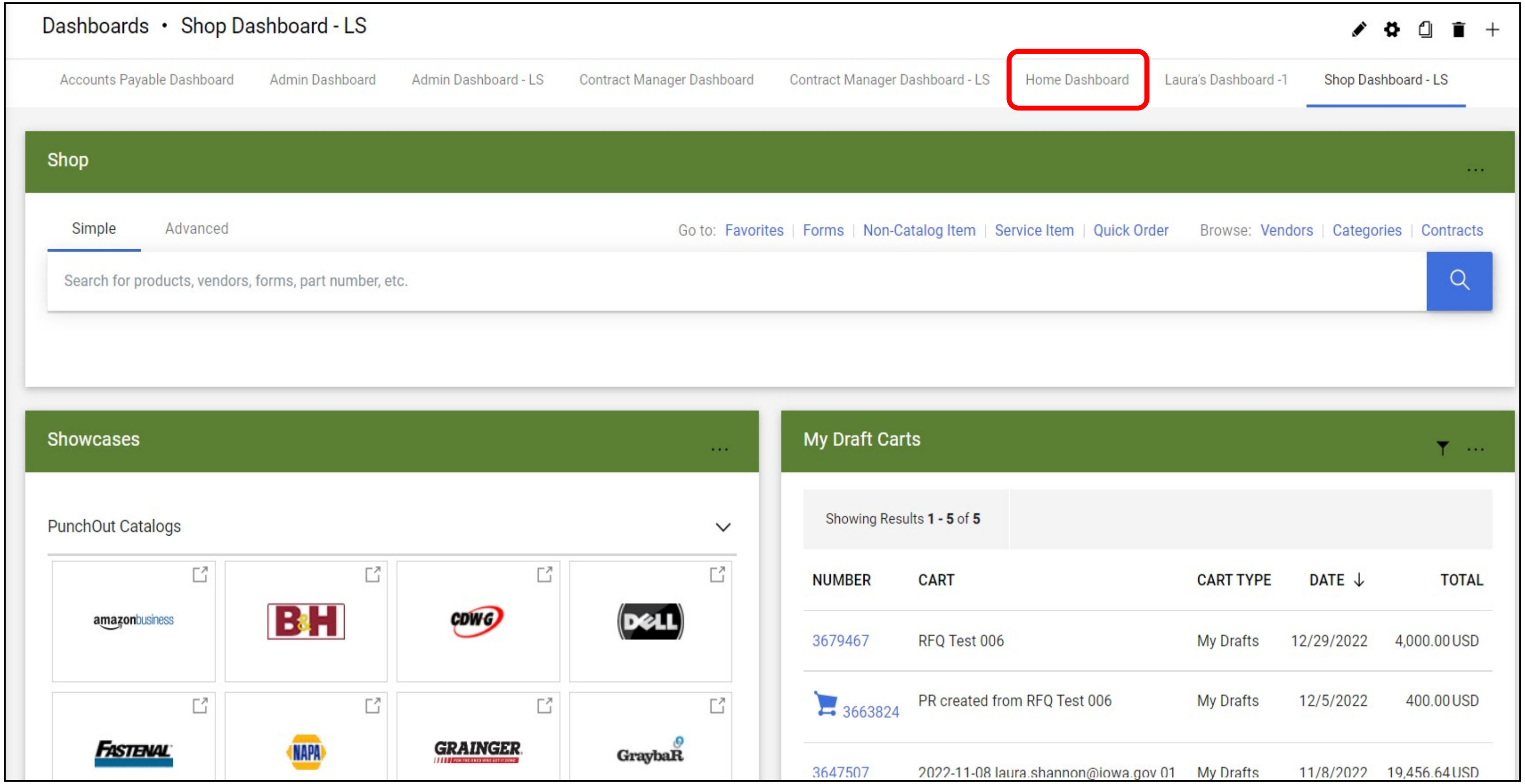
Create a Purchase Requisition

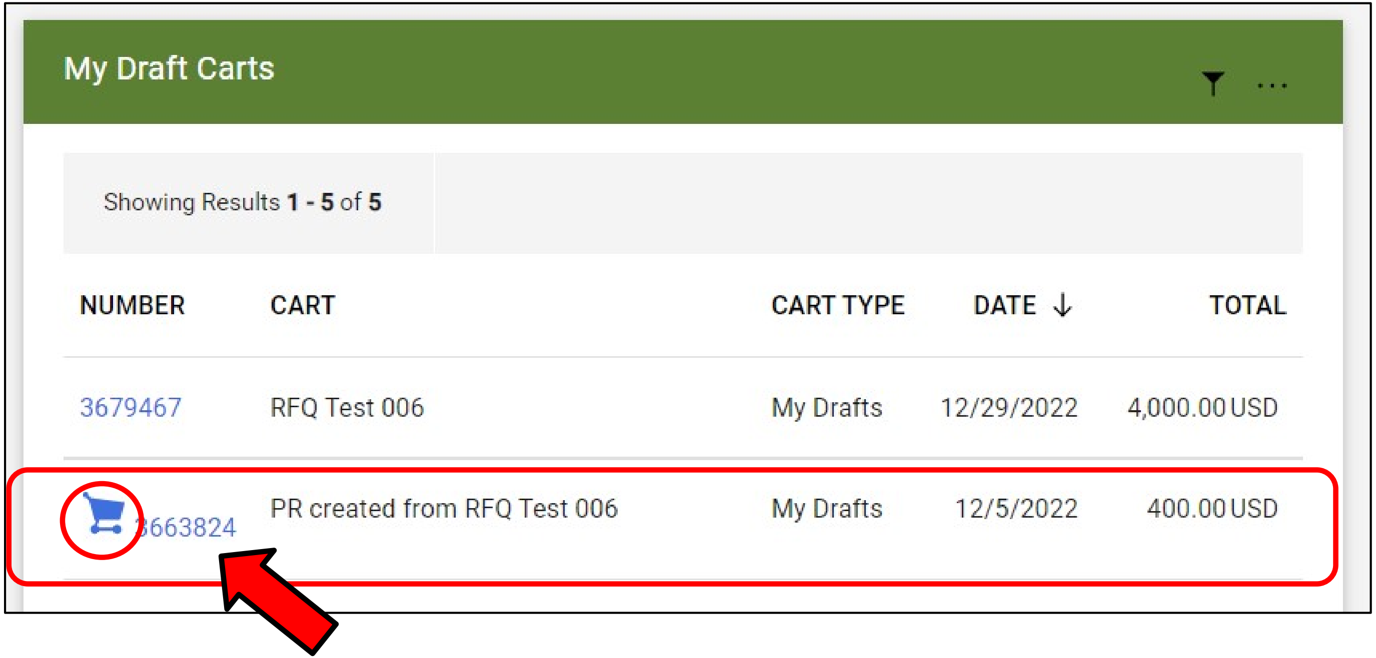
Purchase Requisition (PR)

Navigate to the SHOP Dashboard - It might be called Home Dashboard



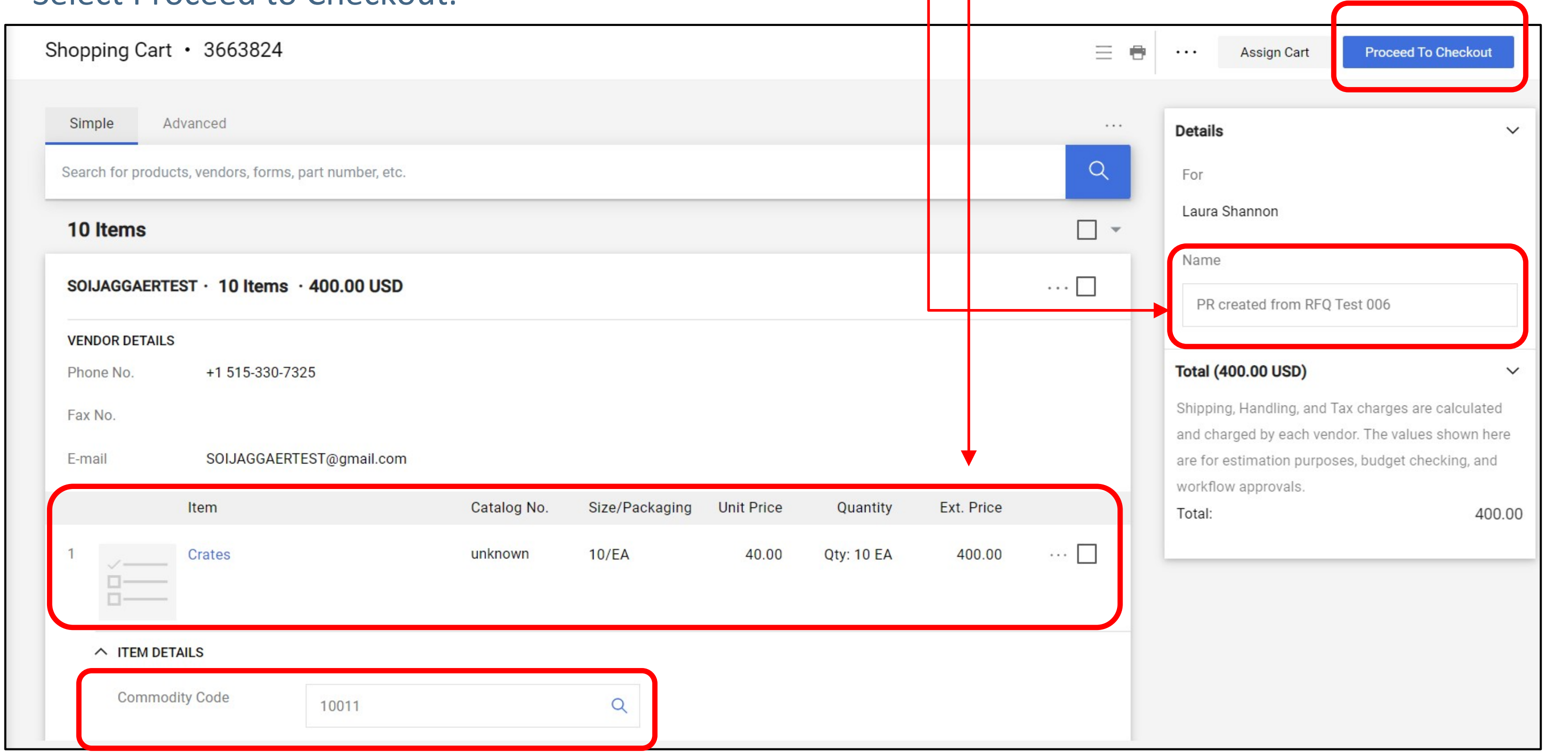
Purchase Requisition (PR)

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.



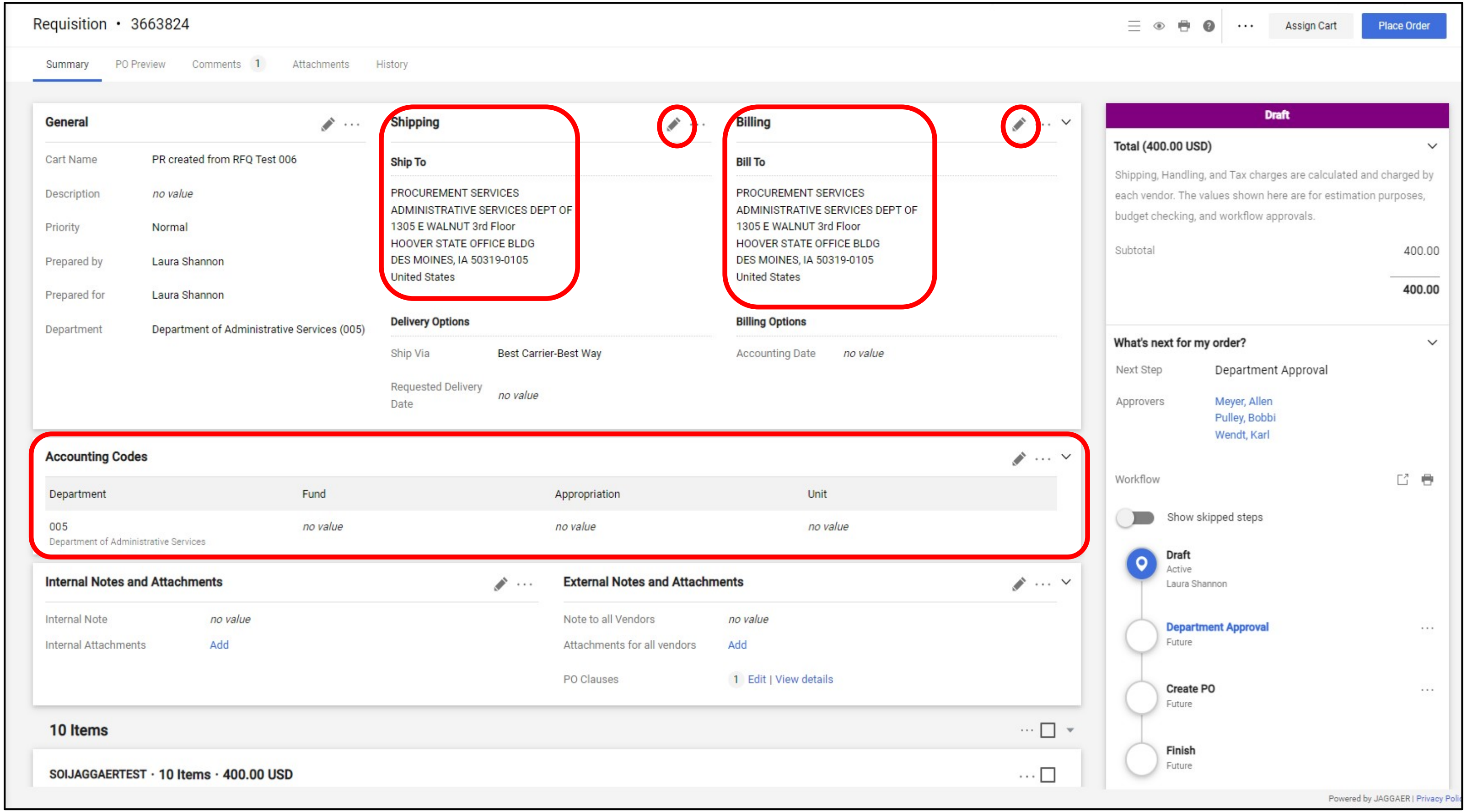
Purchase Requisition (PR)

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.



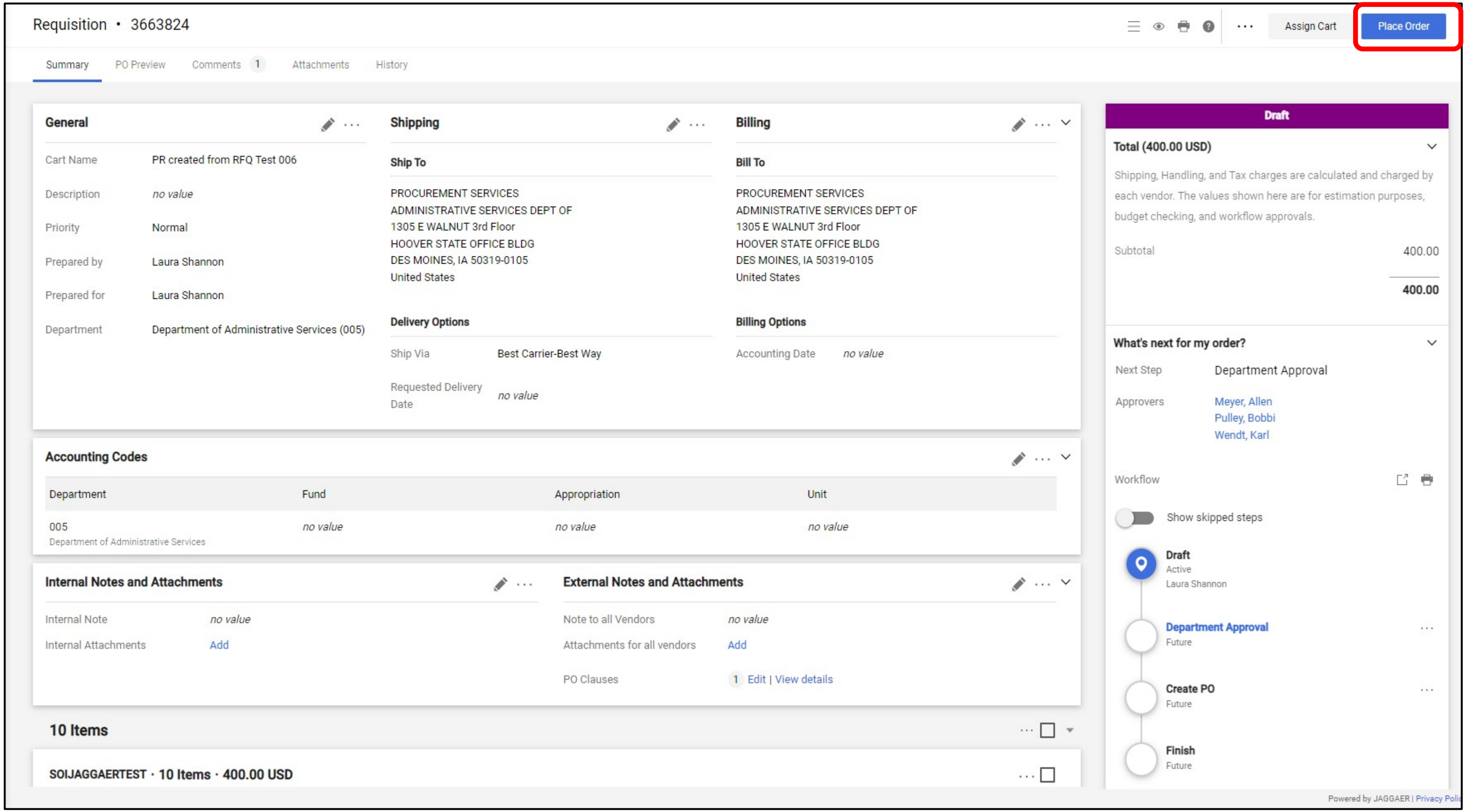
Purchase Requisition (PR)

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



Purchase Requisition (PR)

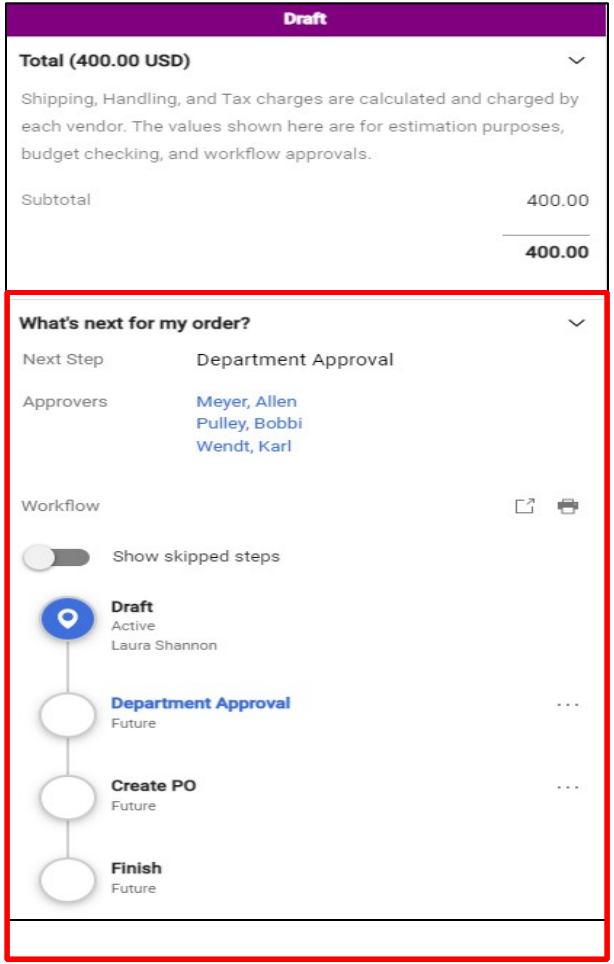
Once all the information is correct, select **Place Order**.



DAS

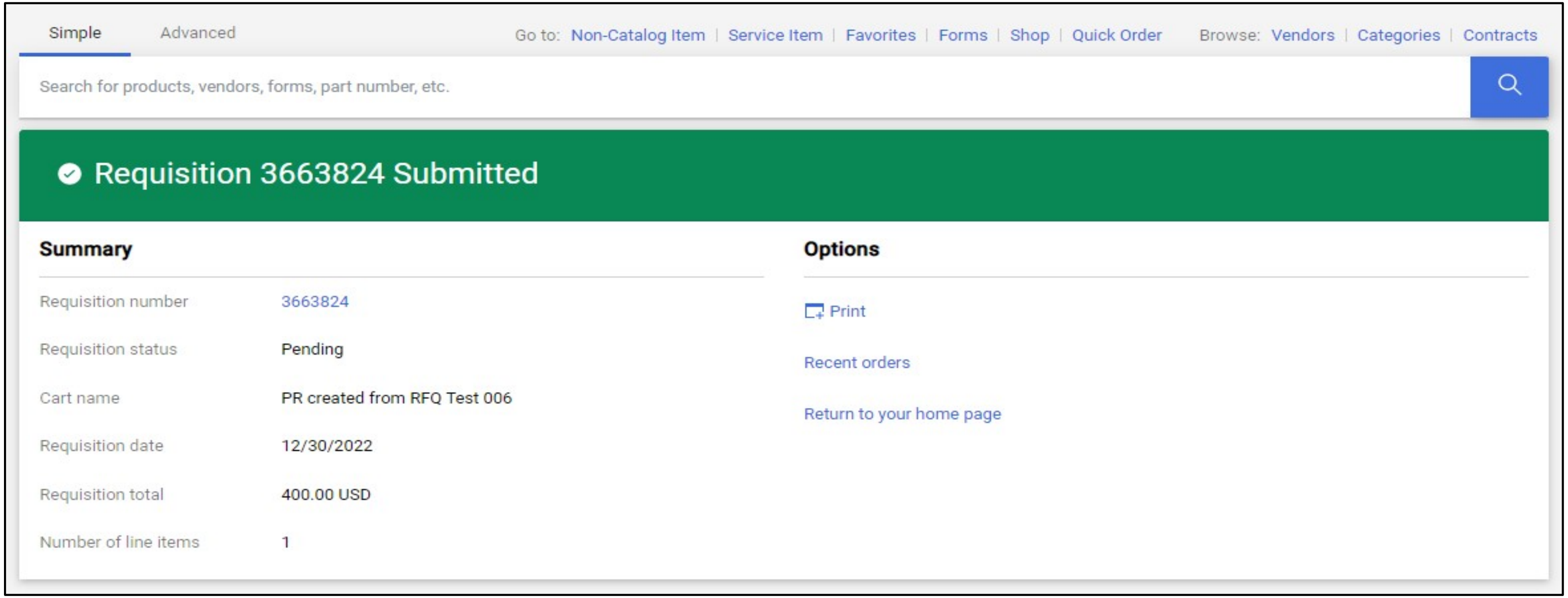
Purchase Requisition (PR)

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.



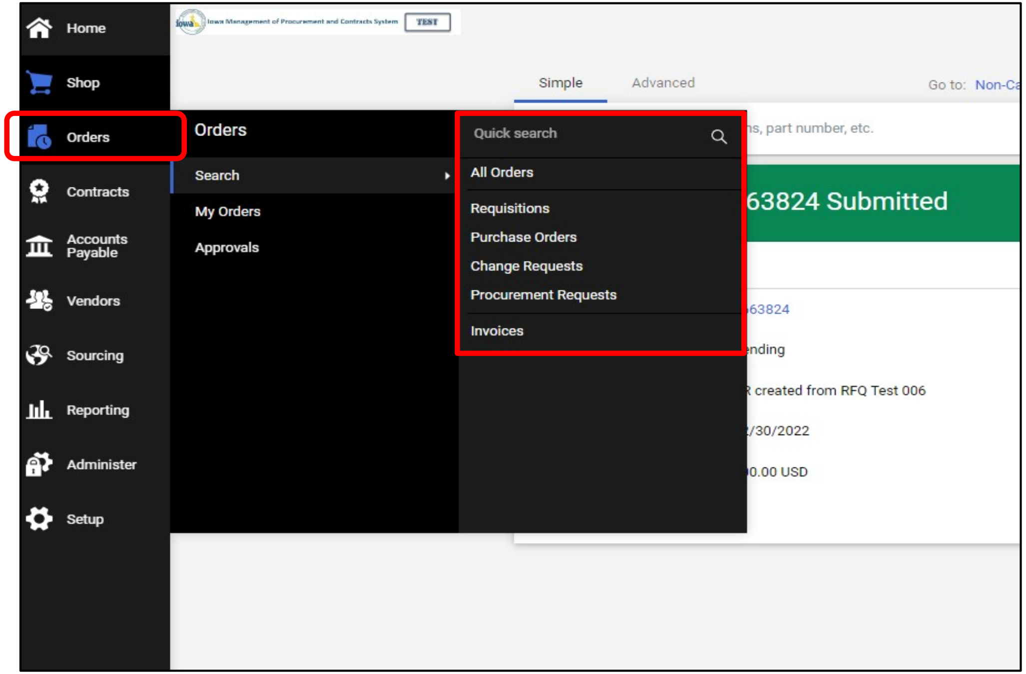
Purchase Requisition (PR)

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.



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.



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Empowering People
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Questions?

Contact:

Laura Shannon
515-330-7325
laura.shannon@iowa.gov