



Iowa Management of Procurement and Contracts System

Request for Proposal (RFP) Step-by-Step Guide - DHHS

Table of Contents

[RFP Rules](#)

[Sign In](#)

[Left Menu Icons](#)

[Create Solicitation \(Event\)](#)

[Setup Wizard](#)

[Users Section](#)

[Description Section](#)

[Buyer Attachments](#)

[Vendors Section](#)

[Review and Submit](#)

[Workflow and Event Actions](#)

[Support](#)

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

See the [DAS Central Procurement Policy and Procedures Manual](#) for more details.

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

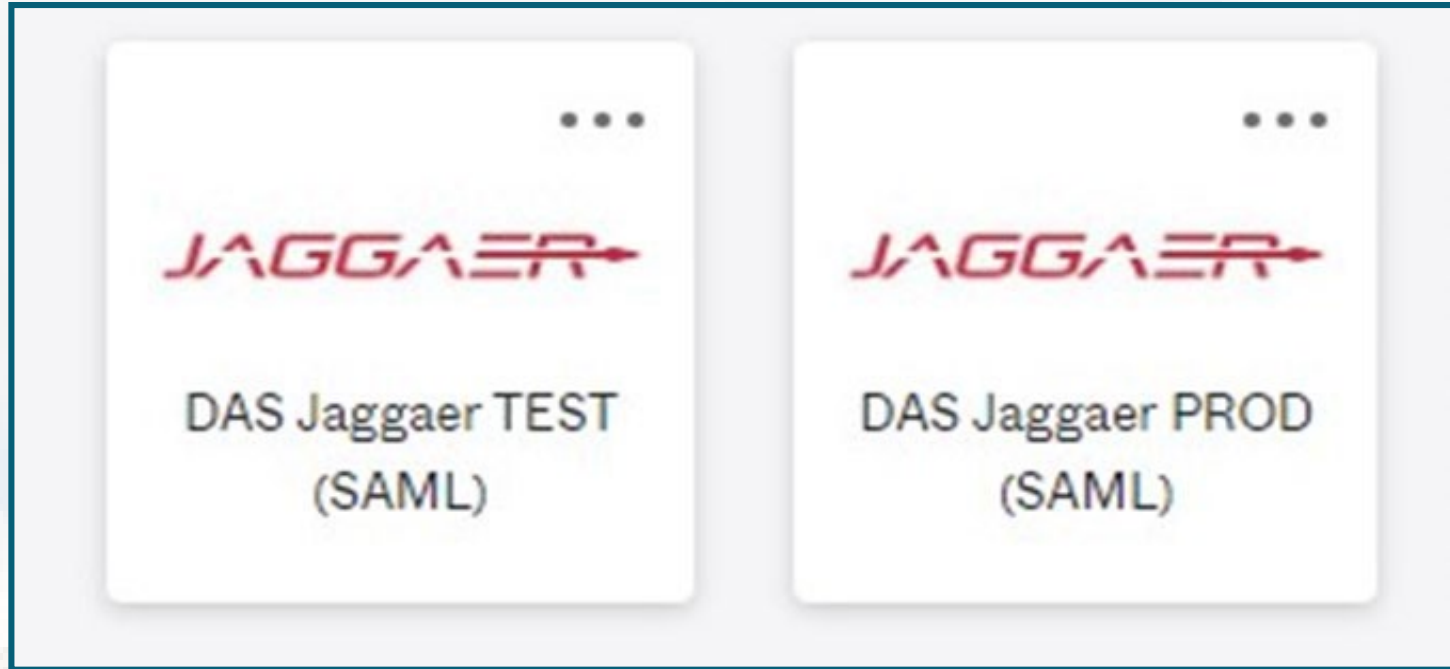
The competitive sealed RFP process includes the following steps:

1. Creating the Request for Proposal (RFP)
2. Posting the RFP on IMPACS and Bid Opportunities **(Note: Bid Opportunities will be discontinued in February 2024)**
3. Receiving and Opening the Proposals
4. Evaluating and Scoring the Proposals
5. Awarding the Contract
6. Negotiating the Contract
7. Generating the Contract

TSB Notification IAC 117.7(2)













Post all solicitations to the TSB web page at least 48 hours before the opening date and time in IMPACS. The TSB posting can be achieved in IMPACS by populating the “Release Date” field on the Setting page with a date at least 48 hours before the opening date and time. **(February 2024)**

Sign into Okta and locate the Jaggaer stickers

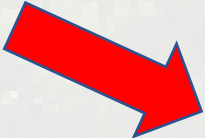


Best practice: Create an RFP in the IMPACS (Jaggaer) TEST UIT environment before posting in the Production (PROD) live site.

Menu

-  Home
-  Shop
-  Orders
-  Contracts
-  Accounts Payable
-  Vendors
-  Sourcing
-  Reporting
-  Administer
-  Setup
-  Menu Search
- 

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



Iowa Management of Procurement and Contracts System All Search (Alt+Q) 2,674.81 USD

Dashboards • Shop Dashboard - LS

Shop Dashboard - LS Solicitations Dashboard - LS Solicitations Home Test (Unsaved)








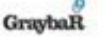
Shop

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 - 4 of 4

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

Powered by JAGGAER | Privacy Policy

Create Solicitation

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

The screenshot shows the IMPACS interface. The top navigation bar includes 'Dashboards' and 'Solicitations Dashboard - LS'. Below this, there are tabs for 'Accounts Payable Dashboard', 'Admin Dashboard', 'Admin Dashboard - LS', and 'Contract Man...'. The main content area is titled 'My Events' and displays 'Total Solicitations: 25'. A table lists events with columns for 'Event Number', 'Event Status', and 'Event Title'. The 'Sourcing' menu is open on the left, with 'Solicitations' selected, and 'Create New Event...' is highlighted in the 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

Create New Event


You will see this pop-up screen 


1. Enter the **Title** of the RFP.
2. Type in **HHS** (Agency) or search for your department by clicking the **Search** icon (magnifying glass).

Create Solicitation ✕

About the Solicitation *(Step 1 of 2)* ?

Event Title *****

Department ***** 

***** Required Next 

(Optional) After clicking Search, you will see this pop-up screen →

Select the arrow next to the appropriate Department tree.

Departments ×

- ▶ Elected Officials
- ▶ INACTIVE
- ▶ Schools
- ▶ State of Iowa Cabinet Agencies
 - ▶ State of Iowa Non-Cabinet Agencies

Selected Value

(Optional) Select the Department

There are three sections of the department tree:

- 1. Elected Officials
- 2. State of Iowa Cabinet Agencies.
- 3. State of Iowa Non-Cabinet Agencies.

Select the arrow next to the appropriate department tree, and drill down until you find the correct department. Click the radio button next to the department, then **Save Changes**.

In the adjacent illustration for Elected Officials, IDALS has several sub-departments under the main department.

Departments x

Search: [] Q

- Elected Officials
- Agriculture and Land Stewardship - IDALS
 - Agriculture - Cattle Promotion
 - Agriculture - Corn Promotion
 - Agriculture - Development Authority
 - Agriculture - Egg Council
 - Agriculture - Soil Conservation
 - Agriculture - Soybean Promotion
 - Agriculture - Turkey Marketing Council
 - Loess Hills Development & Conservation Authority
- Attorney General - Department of Justice
- Auditor of State
- Governor's Office
- Judicial Branch
- Legislative Branch
- Secretary of State - SOS
- Treasurer of State - TOS
- INACTIVE
- Schools
- State of Iowa Cabinet Agencies
- State of Iowa Non-Cabinet Agencies

Selected Value: [No Value Selected]

Save Changes Close

Departments x

Search: [] Q

- Elected Officials
- INACTIVE
- Schools
- State of Iowa Cabinet Agencies
 - Administrative Services - DAS
 - Corrections - DOC
 - Economic Development Authority - IEDA
 - Education - DE
 - Health and Human Services - DHHS
 - Homeland Security & Emergency Management - HSEMD
 - Inspection, Appeals & Licensing - DIAL
 - Insurance & Financial Services - DIFS
 - Iowa Workforce Development - IWD
 - Management - DOM
 - Natural Resources - DNR
 - Public Defense - DPD
 - Public Safety - DPS
 - Revenue - IDR
 - Transportation - DOT
 - Veterans
- State of Iowa Non-Cabinet Agencies

Selected Value: [No Value Selected]

Save Changes Close

Departments x

Search: [] Q

- Elected Officials
- INACTIVE
- Schools
- State of Iowa Cabinet Agencies
- State of Iowa Non-Cabinet Agencies
 - Board of Parole
 - Board of Regents
 - Campaign Finance Disclosure Commission
 - Department for the Blind
 - Executive Council
 - Iowa Communications Network - ICN
 - Iowa Law Enforcement Academy
 - Iowa Public Employees Retirement System - IPERS
 - Iowa Utilities Division - IUB
 - Office of Energy Independence
 - Public Employment Relations Board
 - Public Information Board
 - Rebuild Iowa Office
 - State Fair Foundation

Selected Value: [No Value Selected]

Save Changes Close

(Optional) Select the Department

Click the **Search** icon (magnifying glass) to select the type of solicitation being created. Select the DHHS Event Type that applies.

Select **DHHS - Request for Proposal**.

The **Template** will automatically populate.

Click on **Create Solicitation**.

Create Solicitation [Close]

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

Event Type * [Info] [Search]

Create from Template [Search]

* Required [Previous] **Create Solicitation**

Create Solicitation [Close]

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

Event Type * [Info] [Search]

Create from Template * [Search]

* Required [Previous] **Create Solicitation**

About the Solicitation

Setup Wizard

RFP Test 003

401-RFP-HHS-0012-2024

Type: **DHHS - Request for Proposal**

Event Status: **Draft**

Settings and Content ▾

Setup ▲

Users ✓

Description ✓

Buyer Attachments 0

Vendors 0

Review and Submit ▲

Tools >

Setup

Event Actions ▾ | History | ?

Event Title *

Event Type ⓘ DHHS - Request for Proposal

Department Health & Human Services - DHHS

Event Number * 401-RFP-HHS-0012-2024 ✎

▼ Commodity Codes

Reporting Commodity Code -

Additional Commodity Codes -

Forced Vendor Invitation by Commodity Code Yes

▼ Display and Communication

Visible to Public Yes

Public Event Short Description
200 characters remaining

Restrict Buyer Notifications Yes

▼ Dates

Time Zone

Open Date *
mm/dd/yyyy hh:mm a

Close Date *

★ Required

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

Settings and Content

1. (Optional) The Buyer may change the Title of the RFP.
2. (Optional) The Buyer may change the RFP number by clicking the pencil icon. (IMPACS auto-generates a number by default).
3. By clicking on the **Edit** button next to the **Reporting Commodity Code** and **Additional Commodity Codes**, the Buyer may select the appropriate Commodity Codes for the RFP.

RFP Test 003
401-RFP-HHS-0012-2024

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

Settings and Content ▾

- Setup** ⚠
- Users ✓
- Description ✓
- Buyer Attachments 0
- Vendors 0
- Review and Submit ⚠

Tools >

Setup

Event Title * RFP Test 003 #1

Event Type ⓘ DHHS - Request for Proposal

Department Health & Human Services - DHHS

Event Number * 401-RFP-HHS-0012-2024 #2

Commodity Codes

Reporting Commodity Code - Edit #3

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes

Display and Communication

Visible to Public Yes

Public Event Short Description
200 characters remaining

Restrict Buyer Notifications Yes

Dates

Time Zone CDT/CST - Central Standard Time (US/Cent ▾)

Open Date *
mm/dd/yyyy hh:mm a

Close Date *

★ Required

Save Progress Next >

If the Buyer does not know the Commodity Code, then use the search box at the top of the Commodity Codes Menu that pops up when the Commodity Code **Edit** button is selected. There is also a PDF listing of all the Commodity Codes.

You can find it here under **IMPACS**

Resources: <https://das.iowa.gov/iowa-management-procurement-and-contracts-system-impacs>

Commodity Codes

×

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

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

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

Select the Commodity Code that best fits your RFP.

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

The Vendor (Respondent) will be notified via email of this solicitation if they registered in IMPACS with the commodity code(s) selected for the RFP.

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

Include a brief description of the Goods and/or Services you seek in the **Public Event Short Description** Section. You can expand the box by dragging the lower right-hand corner of the box.

RFP Test 003
401-RFP-HHS-0012-2024

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

Settings and Content ▾

- Setup ⚠
- Users ✓
- Description ✓
- Buyer Attachments 0
- Vendors 0
- Review and Submit ⚠

Tools >

Setup Event Actions ▾ | History | ?

Event Title * RFP Test 003

Event Type ⓘ DHHS - Request for Proposal

Department Health & Human Services - DHHS

Event Number * 401-RFP-HHS-0012-2024 ✎

▼ **Commodity Codes**

Reporting Commodity Code - Edit

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes

▼ **Display and Communication**

Visible to Public Yes

Public Event Short Description 200 characters remaining

Restrict Buyer Notifications Yes

▼ **Dates**

Time Zone CDT/CST - Central Standard Time (US/Cent ▾)

Open Date * mm/dd/yyyy hh:mm a

Close Date *

Display & Communication

Release Date (Future): Please ensure it is at least **48 hours** before the Open Date and time.

The current method is to post the RFP on Bid Opportunities 48 hours before the Open Date and time. By doing this, the solicitation is posted on the TSB website before opening to the public.

Open Date: Select the date and time the RFP will be open to the public.



Type in the date directly in the box or use the pop-up calendar by selecting the calendar icon. The clock icon will set the time.



Continue filling out the **Close Date**.



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

▼ Dates

Time Zone

Release Date ⓘ  

Open Date ★  

Close Date ★  

★ Required

[Save Progress](#)

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

Users Section

Event Creator - The field is automatically populated with the event creator.

Event Owners - You may add additional event owners here (see next page for search options). Depending on how your Department is set up, your department may have full control over this RFP as a default.

Contacts – additional contacts may be added here. The field is automatically populated with the event creator.

Stakeholders are Users interested in the solicitation but can only view it, not edit or respond to questions. This is a good place to list the requestor or evaluators.

Notification Recipients will receive IMPACS notifications, for instance, if a Vendor has submitted a question or if the RFP has been extended. The field is automatically populated with the event creator.

Most of the time, you will not need to change anything on this page.

Generic RFP Test
005-RFP-0311-2023

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

Settings and Content ▾

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

Tools >

Users Event Actions History ?

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 (2 users)
Role: Procurement (0 users)
Department: Department of Administrative Services (005) (13 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

A **User Search** pop-up window will appear once the Edit Users button is selected (from the previous page). Search for the User in the **Search Box** and then click Select once the Buyer has been found.

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

User Search

< > Page 1 of 91 1-10 of 906 Results 10 Per Page ▾

Name	
Brennan, Kelli A	<input type="button" value="Select"/>
Buyer, Betty	<input type="button" value="Select"/>
Test, Buyer	<input type="button" value="Select"/>
Removed_7970691 (inactive)	<input type="button" value="Select"/>
Jacobus, Todd	<input type="button" value="Select"/>
Fitzgerald, Michael	<input type="button" value="Select"/>
Woolery, Dale	<input type="button" value="Select"/>
Pate, Paul	<input type="button" value="Select"/>
Strawn, Matthew	<input type="button" value="Select"/>
Bayens, Stephan	<input type="button" value="Select"/>

< > Page 1 of 91 1-10 of 906 Results 10 Per Page ▾

Selected Values
No Values Selected

Description Section

Buyer Attachments

Location for Purchasing Agent/Issuing Officer Attachments to the Respondents. [Attach RFP Document here](#)

Buyer Attachments Section - This is where the Buyer will upload the RFP document.

Click on the **Add Attachment** button to add the RFP Document and any other relevant files or links. Click the **Add New Attachment** button to upload more attachments or links. Make the RFP document **FIRST** in the list by changing the **Display Order**.

Clicking the **Actions** button will allow you to Edit, Download or Delete the Attachment.

Buyer Attachments Event Actions History ?

Add Attachment ▾

Attachment	Version	Size	Added By	Modified Date	Actions
IMPACS Generic RFP Template.update 120823.docx	1	70 KB	Laura Shannon	1/3/2024 1:54:57 PM	Actions ▾

< Previous Save Progress Next >

Buyer Attachments History ?

Add New Attachment

1-8 of 8 Results 10 Per Page ▾

Attachment	Size	Added By	Modified Date	Actions
RFP - Exceptions Form.docx	20 KB	Laura Shannon	1/10/2023 9:34:02 AM	Actions ▾
Terms and Conditions for Federal Compliance.pdf	165 KB	Laura Shannon	11/21/2022 9:53:00 AM	Actions ▾
GOODS Terms and Conditions 05.1.16.pdf	223 KB	Laura Shannon	1/10/2023 11:11:16 AM	Actions ▾
Iowa HSEMD Additional Terms And Conditions - Federal Compliance - 5.1.21.pdf	130 KB	Laura Shannon	1/10/2023 11:11:16 AM	Actions ▾

Add Attachment Close

Attachment Type File Link

File Drop files to attach, or browse.

Comments

Display Order

* Required Save Changes Close

Vendors Section

Vendors Invited by Commodity Code

Add Vendors to the Event

If there are Vendors that have registered under the Commodity Codes that were entered earlier in the Setup Section, then you will see the number of Vendors that will be notified when the RFP opens.

RFP Test
005-RFP-0414-2023

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

Vendors Invited by Commodity Code (2) Additional Vendors (0) Add Vendors to Event Add Vendors From Group

Based on the event commodity code(s) selected for this event, the candidate vendors in your network are listed below. When the event is released/opened, all vendors with the event commodity code(s) and a valid email address will be invited to participate in this event.

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

Setup ▲
Users ✓
Description ✓
Prerequisites 3
Buyer Attachments 6
Vendor Attachments ✓
Questions 39
Additional Item Fields
Price Components
Items 0
Vendors 2
Review and Submit ▲

Tools >

Event Actions History ?

◀ Previous Save Progress Next ▶

Vendors Invited by Commodity Code

The Buyer may add Vendors to be notified manually.

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

Enter the information and click **Search**.

If the Vendor is registered, then the results will show the Vendor's name and contact information.

(Optional) add a contact by clicking the Add Contact button.

Click **Add to Event** to add the Vendor. They will receive an email notification of the RFP.

Vendors Invited by Commodity Code (2) Additional Vendors (0) **Add Vendors to Event** Add Vendors From Group

Manually Invite Vendors

Search Registered Vendors Show Advanced Search

Vendor:

Relationship: All

Vendor Contact:

Zip Code: Within 5 Miles

Commodity Code: - Edit

NAICS Code: Type to filter...

Clear **Search**

< Previous Save Progress Next >

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 to Event Add Contact

Add Vendors to Event by Searching

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

Click on the Manually Invite Vendors Dropdown box.

Select **Add Vendor to Event**

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

If you have many unregistered vendors to add, then you may download the template, fill it out, and import it back to IMPACS.

Click the **Manually Invite Vendors** button and **Get Import Template**.

Vendors Event Actions History ?

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

Search Registered Vendors

Vendor

Relationship

Vendor Contact

Zip Code Within

Commodity Code

NAICS Code

Manually Invite Vendors

- Import
- Get Import Template
- Add Vendor to Event**

Add Vendor to Event ×

Vendor Name

Sales or Corporate Contact Name

Email

* Required

Add Vendors to Event – Manually Invite

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

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

Introduction

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

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

Key Features of Manually Invited Suppliers Import

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

Manually Invited Supplier Import Fields

Some key information regarding the import format:

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

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

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

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

Instructions Import Data

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

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

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

Import Vendors

Supported file types are: .xlsx and .xls

Import Action

File Name [★] No file chosen
The maximum file size for importing is 5 mb.

Description

Email Me When My Import Is Ready Yes No
[What's this?](#)

[★] Required

Add Vendors to Event – Manually Import

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

Refresh the page often.

Download the validated file and save it to your computer.

The screenshot shows the 'RFB 17 Test 002' page with the 'Exports and Imports' section active. The left-hand 'Tools' menu has 'Exports and Imports' highlighted with a red box. The main table shows one entry with a 'Pending' status, also highlighted with a red box.

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

The screenshot shows the 'RFB 17 Test 002' page with the 'Exports and Imports' section active. The left-hand 'Tools' menu has 'Exports and Imports' highlighted with a red box. The main table shows one entry with a 'Completed' status, also highlighted with a red box. A download link for the file 'manuallyInviteSuppliersTemplate (4).xls' is also highlighted with a red box.

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

Add Vendors to Event – Manually Import

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

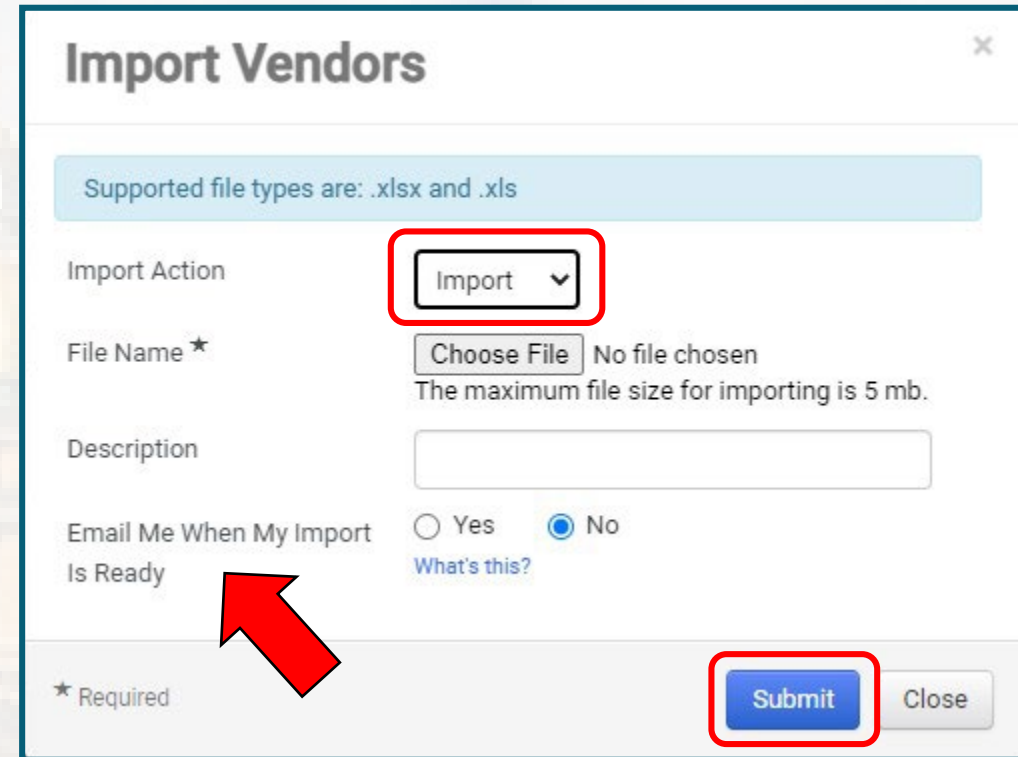
For **Import Action**, Select **Import**.

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

Refresh the page often.

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

Click **Submit**.



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

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

The number of additional Vendors – manually invited - will be indicated in parenthesis in the **Additional Vendors** tab.

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

Save Progress or Next.

Vendors Event Actions ▾ | History | ?

Vendors Invited by Commodity Code (0) **Additional Vendors (1)** [Add Vendors to Event](#) [Add Vendors From Group](#)

1 Event Vendors

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

[◀ Previous](#) [Save Progress](#) [Next ▶](#)

Add Vendors to Event

Review and Submit

Errors and Approval

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

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

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

Once all errors have been addressed, click **Submit for Approval**. The Solicitation should automatically be approved based on DHHS approval workflow settings.

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	Q&A Submission Close Date Open Date Close Date
Users	Required Fields Complete	
Description	Required Fields Complete	
Prerequisites	No Required Data	
Buyer Attachments	No Required Data	
Vendor Attachments	No Required Data	
Questions	No Required Data	
Items	No Required Data	
Vendors	Required Data Provided	

[View Approval Steps](#)

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

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.

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	No Required Data
Buyer Attachments	No Required Data
Vendor Attachments	No Required Data
Questions	No Required Data
Items	No Required Data
Vendors	Required Data Provided

[View Approval Steps](#)

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



To check the Approval Status, click the **Return to My Event** hyperlink.


 **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

Event Summary

Event Title	RFP Test 003	Time Zone	CDT/CST - Central Standard Time (US/Central)
Event Type 	DHHS - Request for Proposal	Open Date	5/1/2024 8:00:00 AM
Department	Health & Human Services - DHHS	Close Date	6/1/2024 2:00:00 PM
Event Number	401-RFP-HHS-0012-2024		
Event Status	Approved		

Return to Event

To check the approval, Navigate to **Tools>Approvals** to see if the approval workflow has been completed.

Before the solicitations is **Released**, you may click the **Workflow Actions** button in the upper right corner to return the Solicitation to draft status to make edits. You may also cancel the Solicitation altogether.

This event is **Approved**. It will be opened to vendors on 5/1/2024 8:00 AM CDT.

RFP Test 003
401-RFP-HHS-0012-2024

Type: **DHHS - Request for Proposal**
Event Status: **Approved**

Settings and Content >

Tools ▾

Internal Notes

Exports and Imports

Q & A Board

Approvals

Approvals

Solicitation Approval Workflow Solicitation Evaluation Workflow

Show skipped steps

Orientation: Horizontal ▾

Submitted 1/5/2024 2:56 PM — Completed 1/5/2024 2:56 PM

Workflow Actions ▾
Cancel Event
Return to Draft

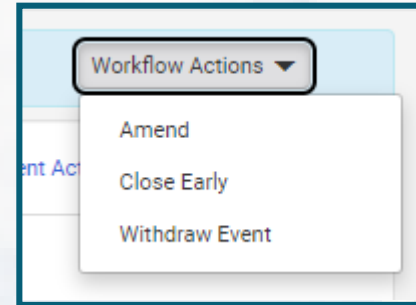
Approvals and Workflow Actions

Workflow and Event Actions

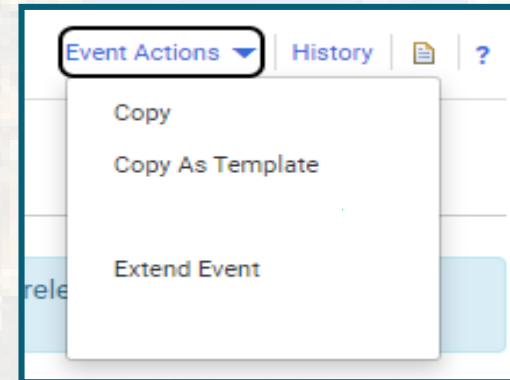
Amend, Extend, Cancel

After the Solicitation is **Released**, the following options are available:

The **Workflow Actions** dropdown in the upper right corner has the following options: **Amend the Solicitation, Close the Solicitation Early, and Withdraw the Solicitation**



The **Event Actions** dropdown in the upper right corner has the following options: **Copy the Solicitation, Export the Solicitation as a PDF, and Extend the Solicitation**



Follow the instructions that pop up after selecting an action. If you amend the solicitation, you must go through the approval process again.

Questions?
Please contact laura.Shannon@iowa.gov
Or call 515-330-7325