



**Department of
Administrative Services**

*Empowering People
Collaboration
Customer Service*

IMPACS (Jaggaer) RFB

Step-by-Step Guide for Request for Bid Creation & Award

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This document is for Step-by-Step RFB Creation in IMPACS – see RFB Evaluation document for an IMPACS Step-by-Step Guide

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RFB Rules

A Request for Bid (RFB) is always a publicly-advertised, formal solicitation. The RFB includes well-defined specifications and/or scope of work, including all contractual terms and conditions. The PA or AAP solicits bids from prospective vendors. Bids for the goods or services must be received by a set date and time. The RFB award is made to the lowest responsible bidder. See the [DAS Central Procurement Policy and Procedures Manual](#) for more details.

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

The competitive sealed bid process includes the following steps:

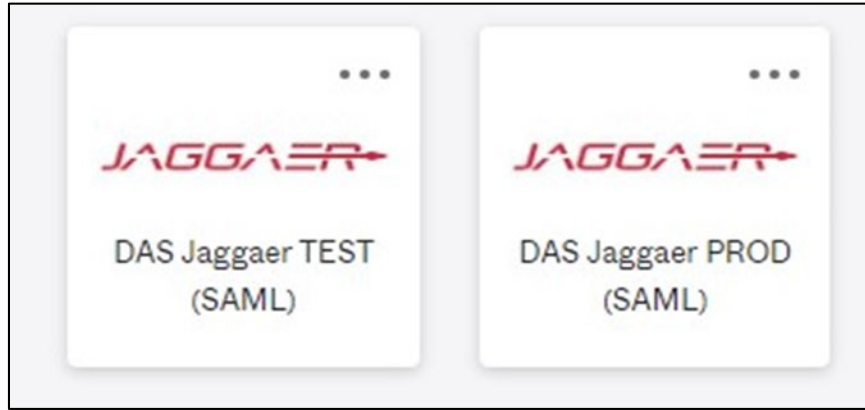
1. Creating the Request for Bid (RFB)
2. Posting the Bid Opportunity on the TSB website and in IMPACS
3. Receiving and Opening Bids
4. Evaluating the Bids
5. Negotiating the Contract
6. Generating the Contract

TSB Notification IAC 117.7(2)

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



Sign into Okta and locate the Jaggaer stickers



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

Left Menu Descriptions



The screenshot shows the Shop Dashboard interface. The left navigation menu is visible, with the 'Menu Search' option at the bottom highlighted by a red box. The main content area displays the 'Shop Dashboard - LS' with a search bar and a table of draft carts.

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3663824	2022-12-05 laura.shannon@iowa.gov 01	My Drafts	12/5/2022	2,674.81 USD
3647507	2022-11-08 laura.shannon@iowa.gov 01	My Drafts	11/8/2022	19,456.64 USD
3647535	Copy of RFB 17 Test 001	My Drafts	11/8/2022	1,595.00 USD



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



Create New Event

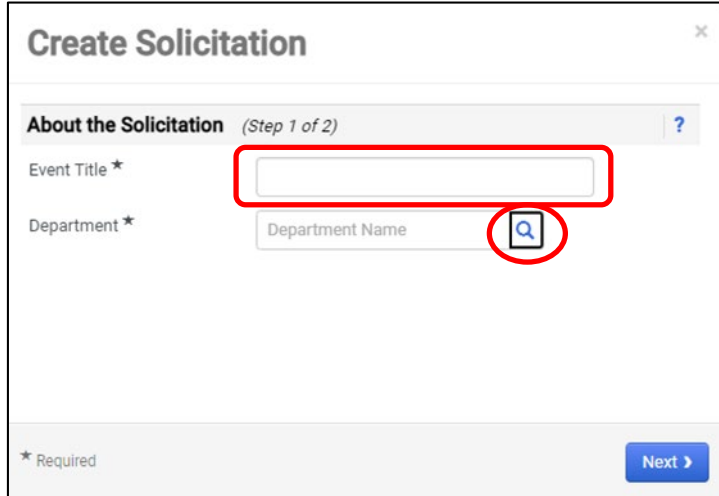
Open the **Sourcing** Menu. Select the **Solicitations** Sub-menu and **Create New Event**.



The screenshot shows the 'Sourcing Management of Procurement and Contracts system' interface. The main dashboard is titled 'Dashboards • Solicitations Dashboard - LS'. A sidebar on the left contains navigation options: Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Sourcing, Reporting, Administer, and Setup. The 'Sourcing' menu is expanded, showing options like Solicitations, Approvals, Templates and Libraries, Reports, Requests, and Sourcing Administration. The 'Solicitations' sub-menu is further expanded, highlighting 'Create New Event...'. The main content area displays 'My Events' with a table of events. The table has columns for Event Number, Event Status, and Event Title. One event is visible: 005-RFB-0159-2022 with a status of 'Draft' and title 'Rehabilitation and In System (CMS)'. Below this, a list of other events is partially visible, including 005-RFB-0254-2023 and 005-RFB-0255-2023, both with a status of 'Under Evaluation'.

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

Create Solicitation



Create Solicitation ×

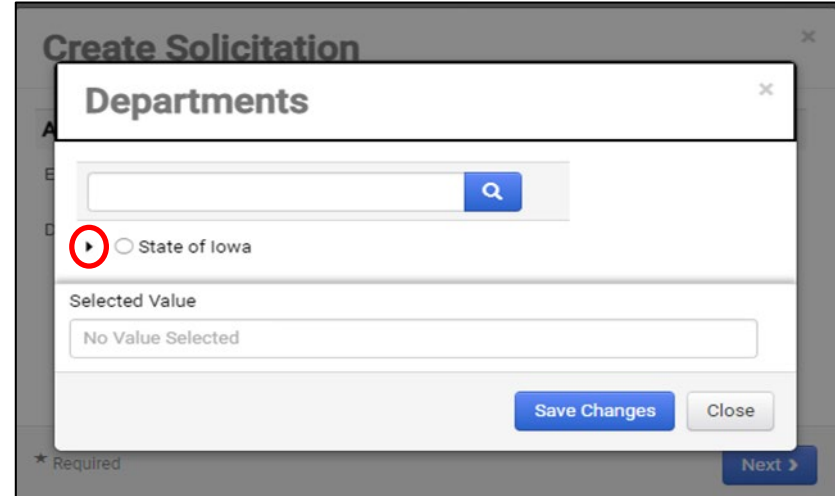
About the Solicitation (Step 1 of 2) ?

Event Title *

Department *

* Required Next ▶

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



Create Solicitation ×

Departments ×

State of Iowa

Selected Value

* Required Save Changes Close Next ▶

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

Adding Department (Agency)

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

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

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

A screenshot of a web application window titled "Departments". At the top is a search bar with a magnifying glass icon. Below the search bar is a list of departments, each preceded by a radio button. The "State of Iowa" department is expanded, showing a sub-menu with "Administrative Services" selected. The "Administrative Services" sub-menu is highlighted with a red box, and its items are: "DAS-General Services", "DAS-General Services-Capitals", and "DAS-General Services-Fleet and Mail". Other departments listed include "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", and "Department of Human Rights". At the bottom of the window, there is a "Selected Value" field containing the text "No Value Selected". To the right of this field are two buttons: "Save Changes" and "Close". The "Save Changes" button is highlighted with a red box.

About the Solicitation

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

Select **Request for Bids**



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]

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

* Required [Previous] **Create Solicitation**

Create from Template

1. Click on the **Search** icon to select from the RFB templates available.
2. Select **RFB for All Agencies – Goods and/or Services**. This Template is for use by all Agencies *except* for DAS CSE - Central Procurement. Click **Select** to load the **Template**.
3. Click on **Create Solicitation**.

Create Solicitation ✕

About the Solicitation (Step 2 of 2) ?

Event Type * 🔍 🔍

Create from Template 🔍 #1

* Required ◀ Previous Create Solicitation #3

Solicitation Templates ✕

🔍

Name	
RFB for All Agencies - Goods and/or Services	Select #2
RFB for DAS - CP Goods and/or Services	Select

Selected Value

Close



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Setup Wizard

Settings and Content

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

RFB Test 015

005-RFB-0269-2023

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

Settings and Content ▾

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

Tools >

Setup

Event Title * RFB Test 015

Event Type ① Request for Bids

Department Administrative Services

Event Number * 005-RFB-0269-2023 ✎

Stage Title

Commodity Codes

Reporting Commodity Code -

Additional Commodity Codes -

Forced Vendor Invitation by Commodity Code Yes

Payment

Currency US Dollar

Estimated Value USD

Payment Terms

Bid and Evaluation

Sealed Bid ① Yes

Respond by Proxy ① Yes No

Use Evaluation Committee ① Yes No

Auto Score Yes No

★ Required



Setup

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

RFB Test 015
005-RFB-0269-2023

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

Settings and Content ▾

Setup ⚠

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

Tools >

Setup Event Actions ▾ | History ?

Event Title * RFB Test 015 **#1**

Event Type ⓘ Request for Bids

Department Administrative Services

Event Number * 005-RFB-0269-2023 **#2**

Stage Title **#3**

Commodity Codes

Reporting Commodity Code - **Edit** **#4**

Additional Commodity Codes - **Edit**

Forced Vendor Invitation by Commodity Code Yes

Payment

Currency US Dollar

Estimated Value USD

Payment Terms

Bid and Evaluation

Sealed Bid ⓘ Yes

Respond by Proxy ⓘ Yes No

Use Evaluation Committee ⓘ Yes No

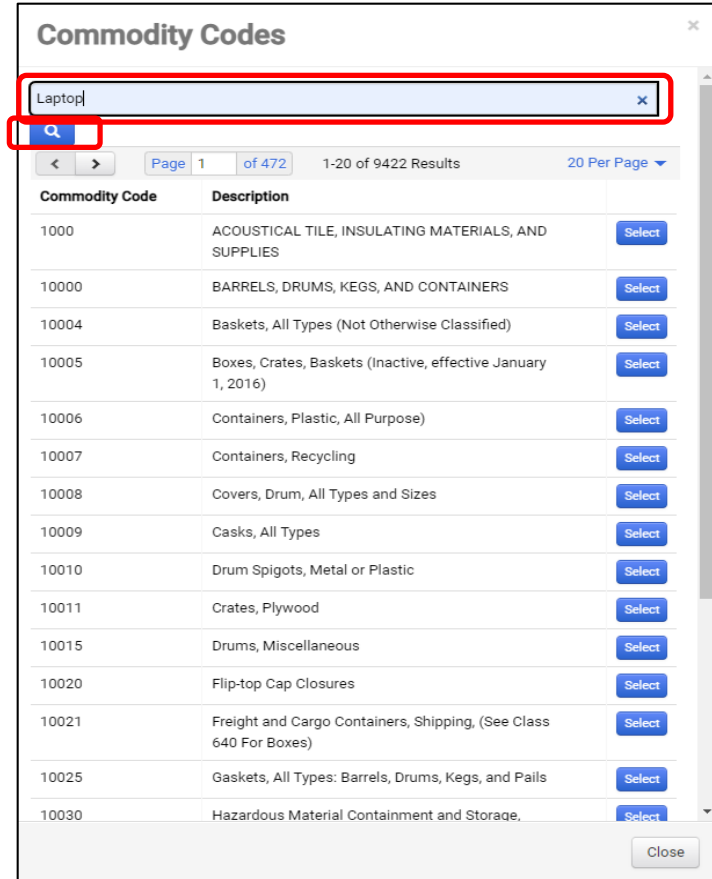
Auto Score Yes No

★ Required

[Save Progress](#) [Next >](#)

Setup – Commodity Codes

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



Commodity Codes

Laptop

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

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

Close

Setup – Commodity Codes

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

Select the Commodity Code that best fits your RFB.

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

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

Setup – Commodity Codes & Payment

1. If the Buyer wants Vendors (Bidders) to be notified of this solicitation then leave the **Forced Vendor Invitation by Commodity Code** field to the default value of **Yes**.
2. Default **Currency** is **US Dollar**.
3. Please estimate the value of the RFB.

The screenshot displays the setup page for 'RFB Test 014' (005-RFB-0267-2023) in the 'Management of Procurement and Contracts System'. The page is divided into several sections:

- Setup:** Includes fields for Event Title (RFB Test 014), Event Type (Request for Bids), Department (Administrative Services), Event Number (005-RFB-0267-2023), and Stage Title.
- Commodity Codes:** Includes Reporting Commodity Code (20454 - *Microcomputers, La.), Additional Commodity Codes, and Forced Vendor Invitation by Commodity Code (Yes). A red arrow labeled '#1' points to the 'Forced Vendor Invitation by Commodity Code' field.
- Payment:** Includes Currency (US Dollar), Estimated Value, and Payment Terms. A red arrow labeled '#2' points to the 'Currency' field, and a red arrow labeled '#3' points to the 'Estimated Value' field.
- Bid and Evaluation:** Includes Sealed Bid (Yes), Respond by Proxy (No), and Use Evaluation Committee (No).

At the bottom right, there are buttons for 'Save Progress' and 'Next'.

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...

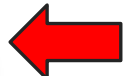
Additional Commodity Codes -

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 type="radio"/> Yes <input checked="" type="radio"/> No
Allow Split Item Quantity in Evaluations ?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enforce Minimum Price	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enforce Maximum Price	<input type="radio"/> Yes <input checked="" type="radio"/> No
▼ Display and Communication	
Visible to Public	Yes
Public Event Short Description	<input type="text"/> 200 characters remaining
Restrict Buyer Notifications	Yes






Setup - Dates

Select the date the RFB will be open to the public. Please make sure it is at least 48 hours after posting the RFB 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**. **Note:** the check box for making the date the same as the close date. Typically Q&A close date is earlier than the close date to give the Buyer time to answer the questions.

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

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

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

At the bottom right of the form, there are two buttons: 'Save Progress' (highlighted with a red arrow labeled '#4') and 'Next >'.



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Users

Add & Edit Users

Users

The Buyer may add Users for access to the RFB.

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 RFB 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.

RFB Test 014
005-RFB-0267-2023

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

Settings and Content ▾

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

Tools >

Users Event Actions History ?

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

Event Creator * [Shannon, Laura](#)

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

Contacts *
Contact information for these users is shown to vendors: Edit Users **#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 [Search] More Options

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

Name	
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 - continued

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

The screenshot shows the 'Users' configuration page for 'RFB Test 014' (ID: 005-RFB-0267-2023). The page is in 'Draft' status. A sidebar on the left contains a navigation menu with items: Setup, Users (checked), Description (checked), Prerequisites (2), Buyer Attachments (1), Vendor Attachments (checked), Questions (35), Additional Item Fields, Price Components, Items (2), Vendors (0), and Review and Submit. The main content area is titled 'Users' and includes a warning: '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.' Below this, several user roles are listed with their assigned users and 'Edit Users' buttons: Event Creator (Shannon, Laura), Event Owners (Shannon, Laura), Event Managers (Admin (4 users), Procurement (1 user)), Contacts (Shannon, Laura), Stakeholders (No User Selected), and Notification Recipients (Shannon, Laura). A legend indicates that a star symbol (*) denotes a required field. At the bottom right, there are three buttons: 'Previous', 'Save Progress' (highlighted with a red box), and 'Next'.





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Description

Description

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

The Buyer may create their own description or add to the existing language.

If using the existing language, please address the areas **highlighted in green**.

Add or delete the language as necessary. The formatting controls are similar to Microsoft Word and **the Buyer may remove the highlighter as necessary**.

Ignore the **Stage Description** – it is not used.

The screenshot shows the 'RFB Test 014' (005-RFB-0267-2023) interface. The left sidebar lists 'Settings and Content' with 'Description' selected and highlighted in red. The main area shows the 'Description' field with a red border and a green highlighter over the text 'Buyer must edit or delete the highlighted text below'. Below it is the 'Stage Description' field, also with a red border. At the bottom right, the 'Save Progress' button is highlighted in red. The interface includes a toolbar with formatting options and a 'Copy from Library' button.



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Prerequisites

Add, Edit & Delete

Prerequisites

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

There are preloaded **Prerequisites** that should be included with every RFB.

1. The Bidder will see a pop-up of the language when they click on the hyperlink. (See next page).
2. You may add **Prerequisites** from the Library or create your own.

The screenshot shows the 'RFB Test 014' page in the 'Iowa Management of Procurement and Contracts System'. The page is titled 'Prerequisites' and shows a list of prerequisites for the event. The event status is 'Draft'. The prerequisites listed are 'Certification of Bid' and 'Authorization to Release Information'. The 'Add Prerequisite' button is highlighted with a red box. The 'Prerequisite Content' section is also highlighted with a red box, showing the text for each prerequisite. The 'Save Progress' and 'Next' buttons are highlighted with a red box at the bottom right.

Prerequisites - Continued

Clicking on the link Prerequisite Content for **Certification of the Bid**, this language pops up in a separate window.



Prerequisite Content

Bidder certifies that the contents of this Bid submitted are true and accurate. Bidder also certifies that Bidder has not knowingly made any false statements in its Bid.

Certification of Independence

I certify that I am a representative of Bidder expressly authorized to make the following certifications on behalf of Bidder. By submitting a Bid in response to the RFB, I certify on behalf of the Bidder the following:

The Bid has been developed independently, without consultation, communication or agreement with any employee or consultant to the Agency or with any person serving as a member of the evaluation committee.

The Bid has been developed independently, without consultation, communication or agreement with any other Bidder or parties for the purpose of restricting competition.

Certification Regarding Debarment

I certify that, to the best of my knowledge, neither Bidder nor any of its principals: (a) are presently or have been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal Agency or State Agency; (b) have within a five year period preceding this Bid been convicted of, or had a civil judgment rendered against them for commission of fraud, a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of antitrust statutes; commission of embezzlement, theft, forgery, falsification or destruction of records, making false statements, or receiving stolen property; (c) are presently indicted for or criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in (b) of this certification; and (d) have not within a three year period preceding this Bid had one or more public transactions (federal, state, or local) terminated for cause.

This certification is a material representation of fact upon which the Agency has relied upon when this transaction was entered into. If it is later determined that Bidder knowingly rendered an erroneous certification, in addition to other remedies available, the Agency may pursue available remedies including suspension, debarment, or termination of the contract.

Certification Regarding Registration, Collection, and Remission of Sales and Use Tax

Pursuant to *Iowa Code sections 423.2(10) and 423.5(8) (2013)* a retailer in Iowa or a retailer maintaining a business in Iowa that enters into a contract with a state agency must register, collect, and remit Iowa sales tax and Iowa use tax levied under *Iowa Code chapter 423* on all sales of tangible personal property and enumerated services. The Act also requires Bidders to certify their compliance with sales tax registration, collection, and remission requirements and provides potential consequences if the certification is false or fraudulent.

By submitting a Bid in response to the (RFB), the Bidder certifies the following:

- Bidder is registered with the Iowa Department of Revenue, collects, and remits Iowa sales and use taxes as required by *Iowa Code chapter 423*; **OR**
- Bidder is not a "retailer" or a "retailer maintaining a place of business in this state" as those terms are defined in *Iowa Code subsections 423.1(47) and (48)*.

Bidder also acknowledges that the Agency may declare the Bidder's Bid or resulting contract void if the above certification is false. The Bidder also understands that fraudulent certification may result in the Agency or its representative filing for

Close

Prerequisites - Edit

1. The Buyer may edit the Prerequisite or delete it.
2. The Buyer may change the instructions to the Vendor (Bidder).
3. The Buyer may change the Prerequisite Content. Enter text or upload a file.
4. The Buyer may change the Certification text.
5. The Buyer may require the Vendor (Bidder) to upload a file.
6. The Buyer may change the order of the Prerequisite language to First, Last, or anywhere in between (if there are more than two Prerequisites).
7. **Save Changes**

Prerequisites Event Actions ▾ | History | ?

[Add Prerequisite ▾](#) ★ Required to Enter Bid

Instructions to vendor	Prerequisite Content	
Bidder shall read and make certifications of the their Bid. ★	Certification of Bid	Actions ▾ Edit Properties Delete
Bidder shall read and authorize to release information for their Bid. ★	Authorization to Release Information	

Edit Prerequisite ✕

Instructions to vendor ★ 941 characters remaining #2

Prerequisite Content ★ #3

Type ★ Edit #3

Certification Text ★ 426 characters remaining #4

Vendor Must Also Upload a File #5

[Show Display Position Options](#) #6

★ Required **Save Changes** Close



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Buyer Attachments

Location for Purchasing Agent/Issuing Officer Attachments to the Bidder

Buyer Attachments

You may **Add Attachments** on this page 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.

RFB Test 014
005-RFB-0267-2023

Type: Request for Bids
Event Status: Draft

Settings and Content

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

Tools

Buyer Attachments

[Add Attachments](#)

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

Event Actions | History

← Previous | [Save Progress](#) | Next →

Buyer Attachments

[Add Attachment](#)

Event Actions | History ?

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

Location for Bidder Attachments – part of the total Bid

Vendor Attachments

Vendor Attachments are where the Buyer will find any of the attachments you asked the Vendor (Bidder) to provide.

The screenshot shows the 'Vendor Attachments' page for 'RFB Test 014' (ID: 005-RFB-0267-2023). The page title 'Vendor Attachments' is highlighted with a red box. A blue banner states: 'For this event vendors will be able to upload attachments with their bid response.' The left sidebar lists various settings and content items, with 'Vendor Attachments' highlighted by a red box and a green checkmark. Other items include Setup, Users, Description, Prerequisites, Buyer Attachments, Questions, Additional Item Fields, Price Components, Items, Vendors, and Review and Submit. The 'Tools' section at the bottom right contains 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box.



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Questions Section

Overview

Questions Section

The **Questions Section** asks the Bidder 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.

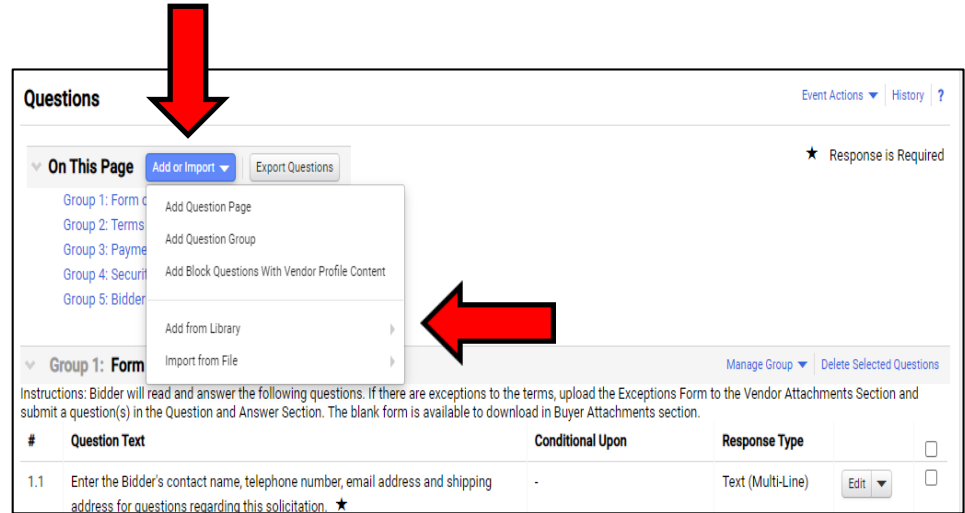
The screenshot displays the 'Questions' section of a procurement system. The interface includes a sidebar with navigation options and a main content area. The main area is titled 'RFB Test 014' and shows a 'Questions' tab. A dropdown menu for 'On This Page' lists question groups: 'Group 1: Form of Bid (15)', 'Group 2: Terms and Conditions (11)', 'Group 3: Payment Terms (5)', 'Group 4: Security (2)', and 'Group 5: Bidder Conference (2)'. The main table lists 18 questions with columns for 'Question Text', 'Conditional Upon', and 'Response Type'. Questions 1.2, 1.3, 1.4, 1.5, 1.6, and 1.7 are marked with a star, indicating they are required responses. A red circle highlights the star on question 1.2.

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

Questions – Adding Groups from IMPACS Library

Additional **Question Groups** may be added from the **IMPACS Library** or imported from a file that the Buyer has saved to their computer or another location.

The Buyer may also add a blank **Question Page** or **Question Group**.

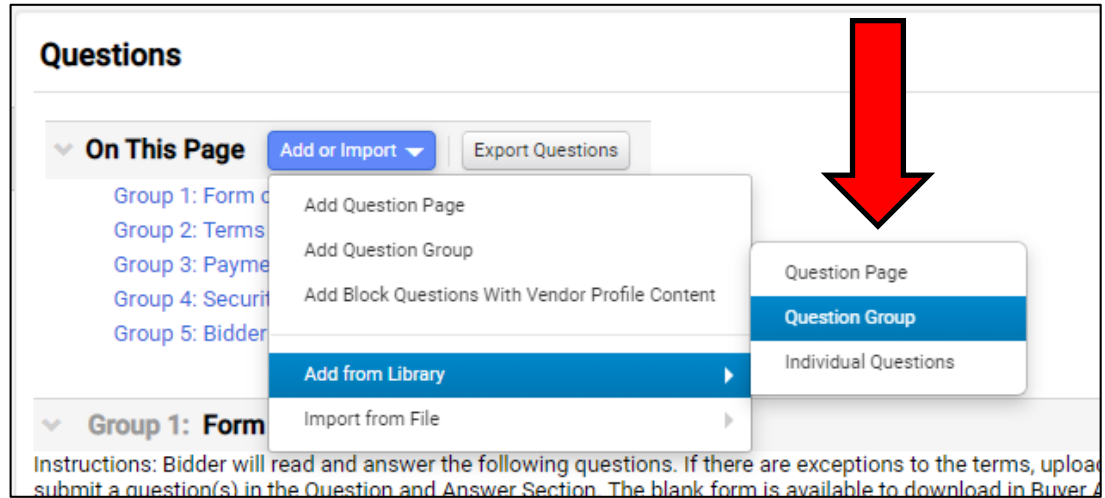


The screenshot shows the 'Questions' management interface. At the top, there are tabs for 'Event Actions' and 'History'. Below the tabs, there's a section titled 'On This Page' with a dropdown menu 'Add or Import' and a button 'Export Questions'. The dropdown menu is open, showing options: 'Add Question Page', 'Add Question Group', 'Add Block Questions With Vendor Profile Content', 'Add from Library', and 'Import from File'. A red arrow points to the 'Add or Import' button, and another red arrow points to the 'Add from Library' option. Below the dropdown, there's a section for 'Group 1: Form' with a 'Manage Group' dropdown and a 'Delete Selected Questions' button. Below this, there's a table of questions with columns for '#', 'Question Text', 'Conditional Upon', and 'Response Type'. The first row shows a question with ID '1.1' and text 'Enter the Bidder's contact name, telephone number, email address and shipping address for questions regarding this solicitation. ★'. The 'Response Type' is 'Text (Multi-Line)' and there is an 'Edit' button.

#	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)	<input type="checkbox"/> <input type="checkbox"/>

Question Group – Add from Library

If **Add from Library** is selected, there is a choice to add a preconfigured **Question Page**, **Question Group** or **Individual Questions**.

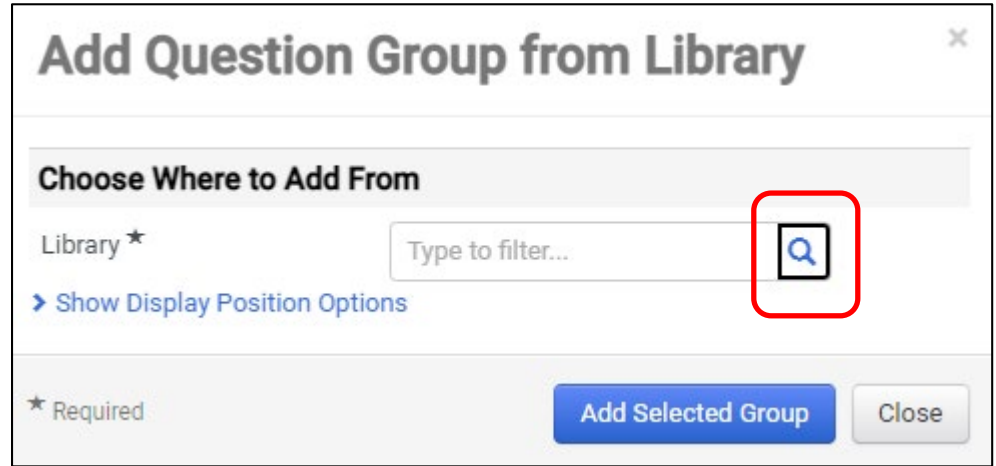


The screenshot shows a web interface for managing questions. At the top, there's a section titled "Questions". Below it, there's a dropdown menu labeled "On This Page" with a sub-menu "Add or Import" and a button "Export Questions". The "Add or Import" sub-menu is open, showing options: "Add Question Page", "Add Question Group", "Add Block Questions With Vendor Profile Content", "Add from Library" (highlighted in blue), and "Import from File". A secondary dropdown menu is open from "Add from Library", showing options: "Question Page", "Question Group" (highlighted in blue), and "Individual Questions". A large red arrow points down to the "Question Group" option in this secondary menu.

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

Question Group – Add Group from Library

When Adding a Question Group from the Library, click on the **Search icon** to select a Question Group from the Library.



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

Question Group – Add Group from Library

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

Click the **Select** button.

Select Values ×

Name

RFB Goods and Services - 12.2022	Select
----------------------------------	--------

Selected Value

Close

Question Group – Add Group from Library

1. Select the **Page** where the **Question Group** will be located.
2. Select the **Question Group** from the Library to be added from the drop-down menu.
3. Select the Display Position of the Question Group (First, Last or anywhere in between).
4. Click the **Add Selected Group** button.

The screenshot shows a dialog box titled "Add Question Group from Library" with a close button (X) in the top right corner. Below the title bar is a section labeled "Choose Where to Add From".

Fields and elements in the dialog:

- Library ***: A search field containing "RFB Goods and Services - 12.2022" with a search icon and a close button (X).
- Question Page**: A dropdown menu showing "Page 1". A red arrow labeled "#1" points to this dropdown.
- Question Group**: A dropdown menu showing "Group 6: Amendments". A red arrow labeled "#2" points to this dropdown.
- Show Display Position Options**: A blue link with a right-pointing arrow. A red arrow labeled "#3" points to this link.
- Add Selected Group**: A blue button. A red arrow labeled "#4" points to this button.
- Close**: A light gray button to the right of the "Add Selected Group" button.
- ★ Required**: A small star icon and the word "Required" are located at the bottom left of the dialog.

Question Group – Add Group from Library

Here is an example of an added **Question Group**.

This specific group is used when the Buyer posts an **Amendment** to the RFB in the **Buyer Attachments Section**.

Note the Instructions. **Every time the Buyer (Issuing Officer) modifies the RFB, and if the Bidder has already submitted a Bid, then the BIDDER must acknowledge the change, Approve and Resubmit their Bid.**

Group 6: Amendments Manage Group ▼ Delete Selected Questions

Instructions: The Bidder must approve and resubmit their Bid after an amendment has been posted by the Issuing Officer. If the Bidder submitted a Bid before the amendment was posted, all information will be saved. The Bidder needs only to read and acknowledge the amendment. To acknowledge, answer the newly posted question in the Questions Section below ("yes" or "no"), and APPROVE and RESUBMIT your Bid.

#	Question Text	Conditional Upon	Response Type		<input type="checkbox"/>
6.1	Bidder acknowledges receipt of Addendum #. ★	-	Yes/No	<input type="button" value="Edit"/> ▼	<input type="checkbox"/>

▲



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Questions Group

Manage Group

Question Group – Manage Group

To Manage a Group of Questions, select **Manage Group**.

From this link the Buyer may:

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

As you can see there are several ways to manage the **Questions Section**. Choose the way that works best for you.

#	Question Text	Conditional Upon		
1.1	Enter the Bidder's contact name, telephone number, email address and shipping address for questions regarding this solicitation. ★	-		
1.2	Enter the Bidder's State or Foreign Country of Residence. ★	-	Text (Single Line)	Edit ▾
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 ▾
1.4	Enter the number of years the Bidder has been in business in the text box. ★	-	Numeric Text Box	Edit ▾
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 ▾

Question Group – Manage Group

If the Buyer wants to change the **Instructions** to the Vendor, Click the **Manage Group** link and select **Edit Group**. There the Buyer will see the **Instructions** text and be able to modify the text or choose not to have instructions.

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 Text	Conditional Upon	Response Type		
Group 2: Terms and Conditions					
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.					
2.1	Bidder shall read the RFB Definitions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.2	Bidder shall read the Administrative Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.3	Bidder shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.4	Bidder shall read the Specification Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.5	Bidder shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.6	Bidder shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.7	Bidder shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.8	Bidder shall read the Insurance Requirements and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.9	The Bidder hereby explicitly authorizes the Agency to conduct criminal history and/or other background investigation(s) of the Bidder, its officers, directors, shareholders, or partners and managerial and supervisory personnel retained by the Bidder for the performance of the Contract. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.10	Public Entities (Political Subdivisions) - The resulting Contract will be made available to Political Entities, i.e. cities, counties, and schools. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.11	Nonprofit Entities - The resulting Contract will be made available to nonprofit entities that qualify under I.R.S. § 501 (c) provisions. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>





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Questions Section

Edit & Delete

Questions - Edit & Delete

There is an option to edit each of the questions or delete the question.

This may be done by using the **Edit** box to the right of the question.

If the Buyer wants to delete multiple questions, select the checkboxes at the far right for the questions that are to be deleted and then click the **Delete Selected Questions** link.

Group 1: Form of 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)	<input type="checkbox"/> Edit Delete
1.2	Enter the Bidder's State or Foreign Country of Residence. ★	-	Text (Single Line)	<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)	<input type="checkbox"/> Edit
1.4	Enter the number of years the Bidder has been in business in the text box. ★	-	Numeric Text Box	<input type="checkbox"/> Edit

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



Questions – Response Type

Each Question has a **Response Type**.

The Buyer may select from the drop-down menu.

New Questions can be created with the different Responses that can best obtain the information the Buyer needs for the RFB.

Save Changes when done editing.

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)	<input type="checkbox"/> <input type="checkbox"/>
1.2	Enter the Bidder's State or Foreign Country of Residence. ★	-	Text (Single Line)	<input type="checkbox"/> <input type="checkbox"/>

Edit Question

Question Text ★
Enter the Bidder's contact name, telephone number, email address and shipping address for
871 characters remaining

Response Type ★
Text (Multi-Line) ▼

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

Attach File

▶ Show Display Position Options

★ Required

Close

Questions – Conditional Follow Up

Conditional actions or answers can be requested via the **Create Conditional Follow-Up** selection under the **Edit** button.

In this example, Question 1.12 asks for a **Yes** or **No** answer. If the Vendor answers **Yes**, then they will see **Follow-Up Question 1.13** which asks for a form to be filled out and uploaded. If they answer **No**, then Question 1.13 will not be visible to the Vendor.

1.12	Is the Bidder requesting confidential treatment of specific information? ★	-	Yes/No	Edit
1.13	A Bidder requesting confidential treatment of specific information shall fully complete the form attached. In the Items Section, mark each good or service upon which the Bidder believes confidential information appears. ★	Is the Bidder requesting confidential treatment of specific information?	File Upload	Edit Delete Create Conditional Follow Up
1.14	The State of Iowa requires shipping to be FOB Destination, Freight Prepaid. Does the Bidder agree to the terms? ★	-	Dropdown List (Pick One)	Edit

Questions – Conditional Follow Up

After selecting **Create Conditional Follow-Up**, the **Edit Question** box opens up and allows you to edit:

- **Conditional Upon Value**
- **Question Text**
- **Response Type**
- **Attach File**

The Buyer may choose from several different **Response Types** from the dropdown box (See next page).

Edit Question

Conditional Upon Is the Bidder requesting confidential treatment of specific information?

Conditional Upon Value * Yes ▾

Question Text * A Bidder requesting confidential treatment of specific information shall fully complete the form attached. In the Items Section, mark each good or service upon which the Bidder believes confidential information appears.

780 characters remaining

Response Type * File Upload ▾

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

Attach File Form 22 Upload ▾

[Show Display Position Options](#)

* Required

Save Changes Close

Questions – Conditional Follow Up

The **Response Type** has several options for the Buyer to structure the **Conditional Response**.

Save Changes after the changes have been made.

The screenshot shows the 'Edit Question' interface. The question text is 'Is the Bidder requesting confidential treatment of specific information?'. The 'Conditional Upon Value' is set to 'Yes'. The 'Response Type' dropdown menu is open, showing options: File Upload (highlighted), Text (Single Line), Text (Multi-Line), Numeric Text Box, Yes/No, Dropdown List (Pick One), Multiple Choice (Pick One), Multiple Select (Pick Many), Date, and Proforma Contract. A red arrow points to the dropdown menu. The 'Save Changes' button is highlighted with a red box. The 'Close' button is also visible.

Questions – Dropdown List

Group 2 – Terms and Conditions also have preloaded Questions that can be deleted based on the requirements for the RFB. The Buyer may modify the question and attach files using the Edit button.

The Bidder will respond to various Terms and Conditions using the **Dropdown List** response Type. The Terms and Conditions questions are structured for the Bidder to answer **Agree or Does Not Accept**. If the Bidder takes exception to specific Terms & Conditions, they should submit a question in the **Question & Answer Section** and note the exception.

#	Question Text	Conditional Upon	Response Type		
2.1	Bidder shall read the RFB Definitions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.2	Bidder shall read the Administrative Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.3	Bidder shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.4	Bidder shall read the Specification Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.5	Bidder shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.6	Bidder shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.7	Bidder shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.8	Bidder shall read the Insurance Requirements and enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.9	The Bidder hereby explicitly authorizes the Agency to conduct criminal history and/or other background investigation(s) of the Bidder, its officers, directors, shareholders, or partners and managerial and supervisory personnel retained by the Bidder for the performance of the Contract. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.10	Public Entities (Political Subdivisions) - The resulting Contract will be made available to Political Entities, i.e. cities, counties, and schools. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>
2.11	Nonprofit Entities - The resulting Contract will be made available to nonprofit entities that qualify under I.R.S. § 501 (c) provisions. Bidder shall enter a response. ★	-	Dropdown List (Pick One)	Edit	<input type="checkbox"/>



Questions – Dropdown List

This is an example of a Disqualifying question. The actual questions in the solicitation templates are different.

Example:

If the Bidder **does NOT** agree to the Terms & Conditions question, then they **cannot move forward** with submitting a Bid.

Note that the checkbox next to **Set Disqualifying Response** is checked and the Response: Bidder does NOT agree to the (Terms) is set to **YES**. **Yes = Disqualify** and the Bidder cannot move forward with submitting a Bid.



Edit Question

Question Text ★
Bidder shall read the RFB Definitions and enter a response.
941 characters remaining

Response Type ★
Dropdown List (Pick One) ▼

Response Options ★

Vendor Response Is Required
 Set Disqualifying Response

Response ★	Disqualify	
Enter response here	<input type="checkbox"/>	+ Add Response
Bidder agrees	No	Remove
Bidder does NOT agree to the Definitions	Yes	Remove
Bidder agrees but will submit exceptions	No	Remove

Attach File [Definitions](#) Upload ▼

[Show Display Position Options](#)

★ Required

[Save Changes](#) [Close](#)



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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 any additional questions about the Goods or Services in the Items Section. This section is optional, but be sure to delete the preloaded Specification line if not used.

Preloaded is a **Specifications Question** where the Bidder must answer **Yes** or **No**. The Buyer may make this answer conditional, where a **No** answer will prevent the Bidder from submitting a Bid.

The Buyer may delete this **Item Field** and/or create their own.

Save Progress after the changes are made.

Additional Item Fields

Name	Conditional Upon	Field Type	Applicable To	Restricted to Item Groups	Vendor Can Respond
Specifications *	-	Yes/No	Product Line Item		Yes

View Additional Field

Name * Specifications

Integration Id -

Description Buyer - please add specifications here.

Applicable To * Product Line Item

Vendor Can Respond Yes
✓ Vendor response is required

Field Type * Yes/No

Response Options
* Set Disqualifying Response
Response *
Yes
No

* Required



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Price Components

Optional

Price Components

The Buyer may create Price Components for the Items in the Bid. This step is optional.

There are two Price Components in the Library:

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

Navigate to the Create Item Price Component.

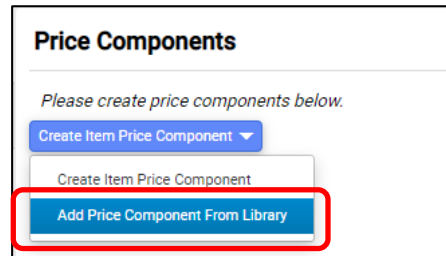
The screenshot displays the 'Iowa Management of Procurement and Contracts System' interface. The main heading is 'RFB Test 014' (005-RFB-0267-2023) with a status of 'Request for Bids' and 'Draft'. A red box highlights the 'Create Item Price Component' button in the 'Price Components' section. The interface includes a sidebar with 'Settings and Content' (Setup, Users, Description, Prerequisites, Buyer Attachments, Vendor Attachments, Questions, Additional Item Fields) and 'Price Components' (Items, Vendors, Review and Submit). Navigation buttons for 'Previous', 'Save Progress', and 'Next' are visible at the bottom right.

Price Components

From the **Create Item Price Component** button, select **Add Price Component From Library**.

Next, select the **Search** icon which will bring up the Library (RFB Goods and Services).

Select RFB Goods and Services.



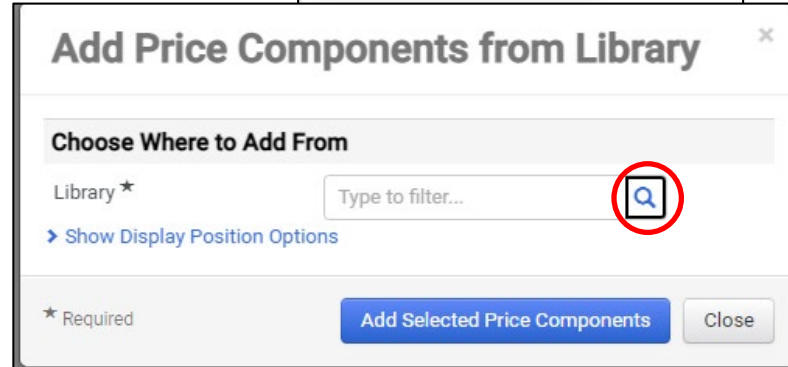
Price Components

Please create price components below.

Create Item Price Component


Create Item Price Component

Add Price Component From Library



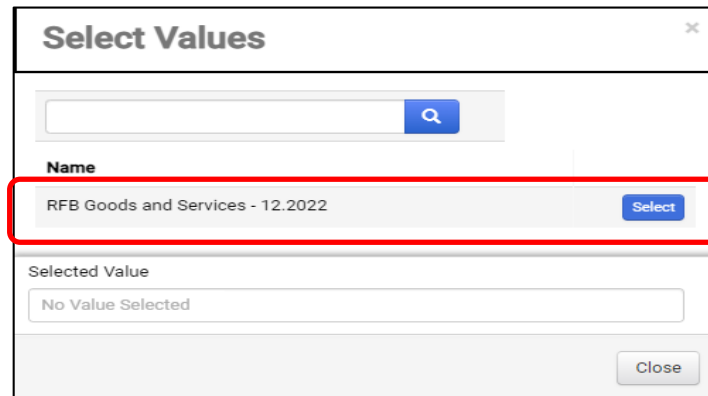
Add Price Components from Library

Choose Where to Add From


Library * 

[Show Display Position Options](#)

* Required **Add Selected Price Components** **Close**



Select Values



Name

RFB Goods and Services - 12.2022 **Select**

Selected Value

No Value Selected

Close

Add Price Components from Library

Select the Price Component to be added by checking the box.

Select **Add Selected Price Components**.

Add Price Components from Library ×

Choose Where to Add From

Library [★] RFB Goods and Services - × 🔍
12.2022

Name	Adjustment Type
<input checked="" type="checkbox"/> Percentage off Catalog [★]	Allowance (%)
<input type="checkbox"/> Price List [★]	Fee (Event Currency)

[➤ Show Display Position Options](#)

[★] Required

Add Selected Price Components Close

Edit Item Price Component

By selecting the **Edit** button to the right of the Price Component, the **Edit Item Price Component** screen pops up.

This is where the name of the Price Component may be changed along with the Description and Adjustment Type.

Vendor response can be required or not.

The Item Price Component may be applied the **Product Line Items, Service Line Items or Both**.

The Buyer may add as many Item Price Components as necessary and adjust the position in the list as necessary.

Save Changes

Edit Item Price Component

Name [★] 78 characters remaining

Description 952 characters remaining

Vendor response is required

Adjustment Type [★]

Applicable To [★] Product Line Item Service Line Item Both

[Show Display Position Options](#)

[★] Required





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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 Service-only RFB, then delete this line. The same is true for a Goods-only RFB – delete the placeholder line on the Services Line Item tab.

The screenshot displays the 'Items' page for 'RFB Test 014' (005-RFB-0267-2023). The page is titled 'Items' and has two tabs: 'Product Line Items (1)' and 'Service Line Items (1)'. The 'Product Line Items' tab is selected. The page shows a table with one item: 'P1.1 Item Description'. The item is highlighted with a red circle. The 'Group P1:' header is also circled in red. A 'Delete Selected Item(s)' button is visible in the top right of the table area. The left sidebar shows navigation options like Setup, Users, Description, Prerequisites, Buyer Attachments, Vendor Attachments, Questions, Additional Item Fields, Price Components, Items, Vendors, Review and Submit, and Tools.

#	Name	Description	Catalog Number	Qty	UOM	Requested Delivery	
P1.1	Item Description *		-	1	Each	-	<input type="checkbox"/>

Product Line Items

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**.

The screenshot displays the TMPT interface for 'RFB Test 014' (005-RFB-0267-2023). The event status is 'Request for Bids Draft'. The 'Items' section shows a table with one item: 'P1.1 Item Description *'. The 'Go To' dropdown is set to 'All Groups', and the 'Add or Import' button is highlighted in red. The 'Manage Group' button is also highlighted in red. The 'Add Product Line Item' button is highlighted in red. The 'Tools' section at the bottom right contains 'Previous', 'Save Progress', and 'Next' buttons.

#	Name	Description	Catalog Number	Qty	UOM	Requested Delivery	
P1.1	Item Description *		-	1	Each	-	Edit



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.



The screenshot shows a web form titled "Edit Product Line Item" with a close button in the top right corner. The form contains several fields and options:

- Name ***: A text input field containing "Item Description", highlighted with a red box.
- Description**: A larger text area with a "2500 characters remaining" indicator.
- Catalog Number**: A text input field.
- Quantity**: A numeric input field with "1.0000" and a dropdown arrow.
- Make Quantity a Vendor Response Field**
- Unit of Measure ***: A dropdown menu showing "EA - Each", highlighted with a red box.
- Item Details**: A section header with a dropdown arrow.
- Requested Delivery**: Radio buttons for "Date" (selected) and "Days after award".
- Requested Delivery Date**: A date input field with a calendar icon and the format "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**: A text input field with a hyphen "-" and an "Edit" button.
- Historical Unit Price**: A text input field with "USD" to its right.
- Target Price**: A text input field with "USD" to its right.
- Attach File**: A text input field with "No File Attached" and an "Upload" button.
- [Show Display Position Options](#)

At the bottom of the form, there is a legend for "*" Required, a "Save Changes" button, and a "Close" button.

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 are helpful for the Bidder and provide 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**.



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

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

Service Line Item

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

Reminder: if the RFB is a Service-only RFB, 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 displays the 'RFB Test 014' interface. The 'Items' section is active, showing a table with one item: S1.1 Service or Task Description. The 'Group S1:' label is circled in red. The 'Save Progress' button is also circled in red. The 'Product Line Items' and 'Service Line Items (1)' tabs are also circled in red.

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 0

Review and Submit ▲

Tools >

Go To: All Groups [Add or Import] [Export Items]

Group S1: Bid Specifications. Bidder must satisfy all the specifications to be deemed a Responsible Bidder (1 - 1 of 1 Items)

#	Name	Description	Qty	UOM	Requested Service Delivery	
S1.1	Service or Task Description		1	Hour	-	[Edit] []

[Add Service Line Item]

[< Previous] [Save Progress] [Next >]



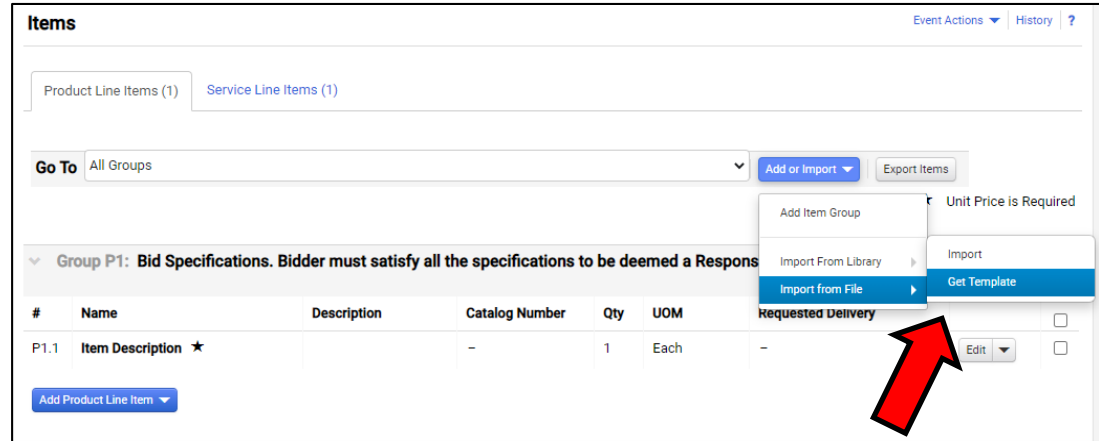
Import from File (Optional)

If **Import from File** is selected, two choices are available:

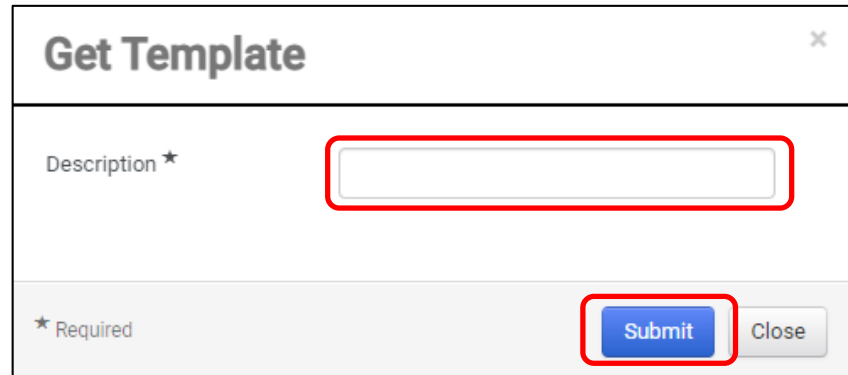
1. **Import**
2. **Get Template**

IMAPCS will only import from data entered into the provided template.

Name the Template in the **Description** box (which may be used multiple times if like items are frequently put out to Bid) and click **Submit**.



The screenshot shows the 'Items' interface. At the top, there are tabs for 'Product Line Items (1)' and 'Service Line Items (1)'. Below this is a 'Go To' dropdown set to 'All Groups' and buttons for 'Add or Import' and 'Export Items'. A dropdown menu is open from the 'Add or Import' button, showing options: 'Add Item Group', 'Import From Library', 'Import From File', 'Import', and 'Get Template'. The 'Import From File' option is highlighted, and a red arrow points to the 'Get Template' option. Below the menu is a table with columns: '#', 'Name', 'Description', 'Catalog Number', 'Qty', 'UOM', 'Requested Delivery', and a checkbox. The first row is 'P1.1 Item Description ★'. At the bottom left is an 'Add Product Line Item' button.



The screenshot shows the 'Get Template' dialog box. It has a title bar with 'Get Template' and a close button. The main area contains a 'Description ★' label followed by a text input field. At the bottom, there is a legend indicating '★ Required' and two buttons: 'Submit' and 'Close'. Red boxes highlight the 'Description' input field and the 'Submit' button.

Exports and Imports

IMPACS will submit the request for the template into the queue. The status of the export can be seen by navigating to the **Tools Section** in the left menu and clicking on **Exports and Imports**.

The screenshot displays the IMPACS interface for 'RFB Test 014' (ID: 005-RFB-0267-2023). The event status is 'Draft'. The left-hand navigation menu includes 'Settings and Content' and 'Tools'. Under 'Tools', the 'Exports and Imports' option is highlighted with a red box. The main content area shows the 'Exports and Imports' section with a table of export records. The first record is highlighted, and its 'Status' is 'Pending', also highlighted with a red box.

Type	Collateral	Description	Requested By	Requested At	Status	File
Export	Items	Test	Laura Shannon	12/5/2022 10:55 AM	Pending	



Exports and Imports

Once completed, the template can be downloaded by clicking on the link.

The Template will look like the graphic below. Fill out the Template with your data and import by clicking the **Add or Import** button on the **Items** page and selecting **Import** and the file name that is the Template with the new data added.

Exports and Imports Event Actions History ?

Exports and Imports will be deleted 7 day(s) after creation.

Looking for this Event exported as a PDF? [Go to View Exports](#) Refresh this Page

Delete Selected

Type ^	Collateral ^	Description ^	Requested By	Requested At ^	Status ^	File ^	
Export	Items	Test	Laura Shannon	12/5/2022 10:55 AM	Completed	ItemsTemplate_133755300	<input type="checkbox"/>

Event Name: RFB Test 014															
Event Number: 005-RFB-0267-2023															
Service Line Items															
										Requested		Requested			
Type	Name	Description	Quantity	Quantity	Vendor Controlled?	Unit of Measure	Commodity Code	Target Price	Alternates Allowed?	Delivery Option	Requested Start Date	Requested End Date	Delivery Days	Unit Price	Minimum Required? Price
Group	Group 1														



Import Items

Note: By importing the new file, all Item data that was populated in the groups will be overwritten.

The upload may take a few minutes, so you may choose to be notified by email when the import is finished.

Click **Submit**



Import Items

Supported file types are .xlsx and .xls

This import action will **replace** all existing items. To retain the items, first export them, then make changes to the export before importing them.

Import Action:

File Name [★]: No file chosen

Description:

Email When Import Is Ready: Yes No [What's This?](#)

[★] Required

Product Line Items

After entering all Line Items, Save Progress or Next.

The screenshot shows the 'iowa' DAS system interface for 'RFB Test 014' (005-RFB-0267-2023). The event status is 'Draft'. The left sidebar shows a navigation menu with 'Items' selected, indicating 2 items. The main area shows the 'Items' configuration for 'Group P1: Bid Specifications. Bidder must satisfy all the specifications to be deemed a Responsible Bidder'. A table lists the items:

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

At the bottom right, the 'Save Progress' button is highlighted with a red box, along with 'Previous' and 'Next' buttons.





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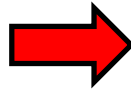
Vendors

Vendors Invited by Commodity Code

Add Vendors to the Event

Vendors Invited by Commodity Code

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



The image displays two screenshots of a software interface for managing procurement events. The top screenshot shows the 'Vendors' section for 'RFB Test 014' (005-RFB-0267-2023). The 'Vendors' section is highlighted with a red box, showing 'Vendors Invited by Commodity Code (0)'. Below this, a message states: 'There are no registered vendors in your network that match the event commodity code. Update the event commodity code now.' The bottom screenshot shows the 'Setup' section for the same event. The 'Commodity Codes' section is highlighted with a red box, showing a 'Reporting Commodity Code' of '20454 - *Microcomputers, La...' and an 'Additional Commodity Codes' field set to '-'. The 'Forced Vendor Invitation by Commodity Code' is set to 'Yes'. The interface includes navigation tabs like 'Sourcing', 'Solicitations', and 'Search Events', and a 'Tools' section at the bottom.

Add Vendors to Event

The Buyer may add Vendors to be notified manually.

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

Enter the information and click **Search**.

The screenshot displays the IMPACS (Iowa Management of Procurement and Contracts System) interface. The main header shows 'Sourcing > Solicitations > Search Events'. The event details are 'RFB Test 014' (005-RFB-0267-2023) with a status of 'Request for Bids Draft'. A left-hand navigation menu includes sections like 'Settings and Content', 'Vendors' (0), and 'Tools'. The main content area is titled 'Vendors' and features a search window. The search window has a red box around the 'Add Vendors to Event' button and another red box around the 'Search' button. The search fields include: Vendor (text input), Relationship (dropdown menu set to 'In Network'), Vendor Contact (text input), Zip Code (text input with a 'Within 5 Miles' dropdown), Commodity Code (text input with an 'Edit' button), and NAICS Code (text input with a search icon). At the bottom of the search window are 'Clear' and 'Search' buttons. The bottom of the page has navigation buttons: '< Previous', 'Save Progress', and 'Next >'.



Add Vendors to the Event & Manually Invite Vendors

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

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

Click on the Manually Invite Vendors Dropdown box.

Select **Add Vendor to Event**

The screenshot displays the 'Vendors' interface. At the top, there are navigation links for 'Event Actions' and 'History'. Below this, there are filters for 'Vendors Invited by Commodity Code (0)', 'Additional Vendors (0)', 'Add Vendors to Event', and 'Add Vendors From Group'. A 'Saved Searches' dropdown and a 'Manually Invite Vendors' dropdown are also present. A 'Modify Search' link is located below the filters.

The main section shows a table of vendors. The first vendor is 'BAKER MECHANICAL INC'. The table has columns for 'Vendor Name', 'Doing Business As', 'Sales and Corporate Contacts', and 'Action'. The 'Action' column for this vendor has an 'Add to Event' button highlighted with a red box.

Below the table, there is a 'Search Registered Vendors' section with various search criteria: Vendor, Relationship (set to 'All'), Vendor Contact, Zip Code (with a 'Within 5 Miles' dropdown), Commodity Code (with an 'Edit' button), and NAICS Code (with a search input field). A 'Search' button is at the bottom right.

A red arrow points to the 'Manually Invite Vendors' dropdown, which is open, showing options: 'Import', 'Get Import Template', and 'Add Vendor to Event'. The 'Add Vendor to Event' option is highlighted with a red box.



Manually Invite Vendors – Add Vendor to Event

The Buyer can now add unregistered Vendors to the Event notification.

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

Add Vendor to Event ✕

Vendor Name ★

Sales or Corporate Contact Name

Email ★

★ Required

Manually Import Vendors

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

Select **Get Import Template**.

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

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

Introduction

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

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

Key Features of Manually Invited Suppliers Import

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

Manually Invited Supplier Import Fields

Some key information regarding the import format:

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

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

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

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

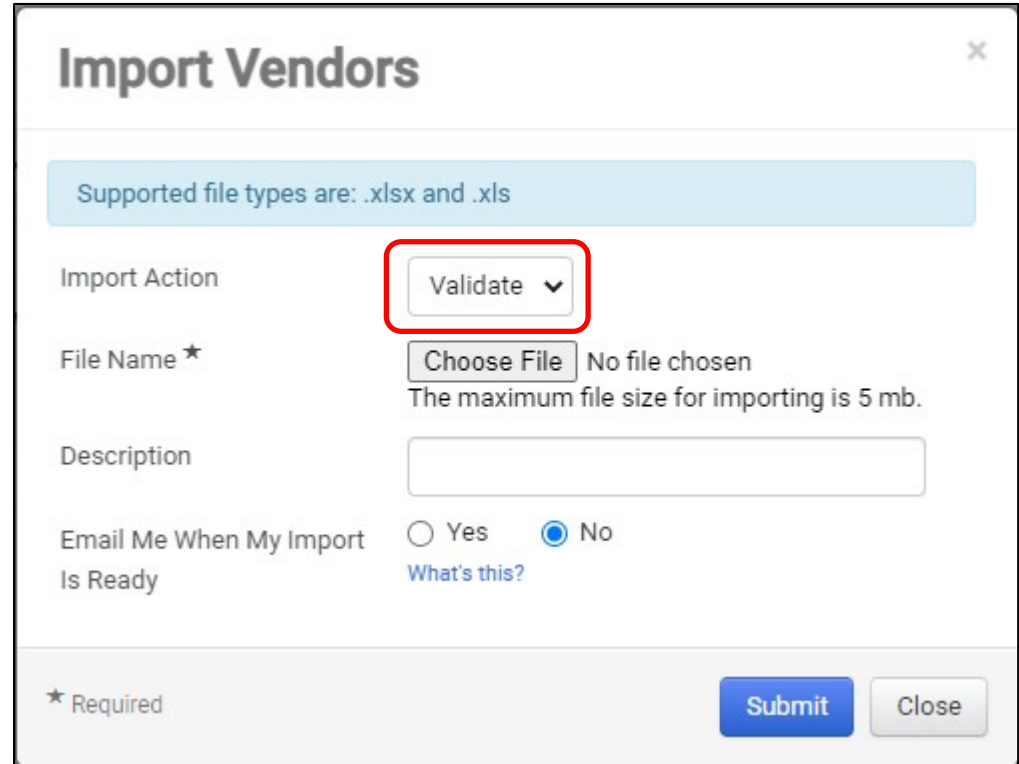
The screenshot shows a Microsoft Word document with a green header bar containing the text "manually/inviteSuppliersTemplate (3) [Comp]". The ribbon includes "File", "Home", "Insert", "Draw", "Page Layout", "Formulas", "Data", "Review", "View", and "Help". The "Home" ribbon is active, showing options for "Cut", "Copy", "Paste", "Format Painter", "Clipboard", "Font", "Alignment", "Number", and "Table". The document content includes sections for "Introduction", "Key Features of Manually Invited Suppliers Import", and "Manually Invited Supplier Import Fields". A table at the bottom details the "Import Data" tab fields. The "Instructions" tab is highlighted in the bottom navigation bar.

Import Vendors

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

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

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



The screenshot shows a web form titled "Import Vendors" with a close button (X) in the top right corner. 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 "Validate" selected and a downward arrow. This dropdown is highlighted with a red rectangular box.
- File Name ***: A "Choose File" button, followed by the text "No file chosen" and "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 located below the "No" option.

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

Validation of Vendor File

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

Refresh the page often.

Download the validated file and save it to your computer.

The screenshot shows the 'Exports and Imports' section for 'RFB 17 Test 002' (005-RFB-0240-2023). The event status is 'Draft'. The left sidebar menu has 'Exports and Imports' highlighted. The main table shows one entry with a status of 'Pending'.

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

The screenshot shows the 'Exports and Imports' section for 'RFB 17 Test 002' (005-RFB-0240-2023). The event status is 'Draft'. The left sidebar menu has 'Exports and Imports' highlighted. The main table shows one entry with a status of 'Completed' and a download link for the validated file.

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** 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**.

Import Vendors [X]

Supported file types are: .xlsx and .xls

Import Action: **Import** ▾

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

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 remove a Vendor here.

Save Progress or **Next**.

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

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

At the bottom of the interface, there are three buttons: "Previous", "Save Progress", and "Next".





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Review and Submit

Errors and Approval

Review and Submit

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

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

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

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

The RFB will enter the approval workflow and the approver will either Approve or send the RFB back for revisions.



RFB Test 014
005-RFB-0267-2023

Type: Request for Bids
Event Status: Draft

Settings and Content

- Setup
- Users
- Description
- Prerequisites
- Buyer Attachments
- Vendor Attachments
- Questions
- Additional Item Fields
- Price Components
- Items
- Vendors

Review and Submit

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 QA Submission Close Date Open 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	Required Data Provided	
Vendors	Required Data Provided	

Review and Submit

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	Required Data Provided
Vendors	Required Data Provided

View Approval Steps

Submit for Approval



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IMPACS (Jaggaer) RFB

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

Table of Contents

Vendor Responses

Tools Menu

- Question & Answers Section

Evaluation

Award Notifications

Export and Publish

Initiate Contract from Sourced Event

Initiate Procurement Process

Create a Purchase Requisition





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Vendor Responses

Before RFB Close

Vendor Responses

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

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

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

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

Vendor Responses

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

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



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Tools

Questions and Answers Board

Question & Answer Board

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


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

RFB Approval Test
005-RFB-0270-2023

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

Settings and Content >

Vendor Responses >

Tools ▾ 

Internal Notes

Exports and Imports

Q & A Board

Approvals

Award Notifications

Question & Answer Board

Event Actions ▾ History ?

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

Submit Question ▾

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

Vendor Go Sort by Date Asked: Most Recent First ▾

All questions have been answered.



Question & Answer Board

The question will appear on the Q&A Board.

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

Question & Answer Board Event Actions ▾ History ?

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

Submit Question ▾

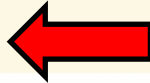
Unanswered Questions (1) Public Q&A (0) **Questions from Vendors (1)** Questions sent to Vendors (0)

Vendor Go Sort by Date Asked: Most Recent First ▾

Timeframe

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

No answer yet.

Answer Question ▾ 

Question & Answer Board – Answer Question

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

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

When done select **Post Answer**.



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 for '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 RFB.

Award Scenario for I

View Scenario ▾ Save As... Reset Export ▾

Scenario Navigator Scenario Breakdown Scenario Savings

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

Scenario Award Actions ▾ **SOIJAGGAERTEST** ▾ Bidder

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



Evaluation

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

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

Be sure to check the boxes that you are awarding.

Award Scenario for

View Scenario ▾ Save As... Reset Export ▾

Scenario Navigator Scenario Breakdown Scenario Savings

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

Scenario Award Actions ▾ **SOIJAGGAERTEST** ▾

Award To SOIJAGGAERTEST
No Award

1000 characters remaining

Auto Score 0

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

Evaluation – Using Scenario

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

Load their own Saved Scenario or;

Award to a single Bidder with the lowest price or;

Award to a single Bidder with the lowest adjusted price.

Award Scenario for

View Scenario ▾ Save As... Reset Export ▾

Load Saved Scenario

- Single Award -
Lowest Bid Price

Lowest Adjusted Bid Price

Best Auto Score

- Split Award -
Lowest Bid Price

Scenario Award Actions ▾

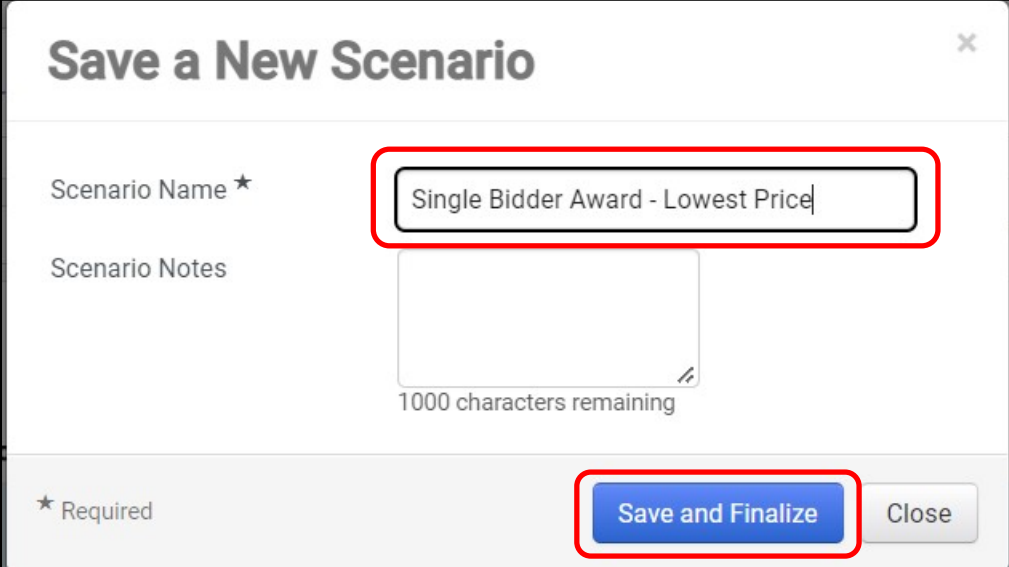
SOIJAGGAERTEST ▾

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

Evaluation – Using Scenarios

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

The Buyer names their scenario and selects Save and Finalize.



Save a New Scenario ✕

Scenario Name ★

Scenario Notes

1000 characters remaining

★ Required

Evaluation – Using Scenarios

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

Select **Finalize Award**.

The screenshot displays the 'Award Scenario for' interface. At the top, there is a navigation bar with buttons for 'View Scenario', 'Save As...', 'Reset', 'Export', and 'Finalize Award'. The 'Finalize Award' button is highlighted with a red box. Below this, there are tabs for 'Scenario Navigator', 'Scenario Breakdown', and 'Scenario Savings'. The 'Sort Bids by:' section shows 'Total Bid' and 'Ascending' dropdowns, along with a checked 'Show Vendor Response Notes' option. In the main content area, there is a table with columns for 'Scenario Award Actions' and 'Awarded Scenario'. The 'Awarded Scenario' column contains the name 'SOIJAGGAERTEST' and a green 'Pending Award' tag, both of which are highlighted with a red box. Below the table, there is a 'Response Notes' section with a text input field and a '1000 characters remaining' indicator.

Evaluation – Using Scenarios

Once the Award has been Finalized the banner will indicate **Finalized**.
The Buyer may also **Remove Finalized Award** and pick a different Award Scenario.

DO NOT SUBMIT FOR APPROVAL at this time.

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

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



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Award Notifications

Award Notifications

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

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

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

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

System generated NOIA emails – DO NOT USE

Award Notifications

Email Template Location

Event Actions History ?

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

Public Site Award Attachments

Add Attachment

No attachments have been added.

Award Notifications

Awarded Vendor Email Template

Date

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

The following vendors submitted responses to the above solicitation:

Participating Vendors

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

Awarded Vendor Name

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

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

Please see the Solicitation Administrative Terms for more information.

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

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

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



Award Notifications

Participating Vendor Email Template

Date

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

The following vendors submitted responses to the above solicitation:

Participating Vendors

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

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

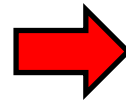
After the appeal period has ended, navigate to **Workflow Actions** and select **Approve**. The Pending Award Vendor is now Awarded.

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 **SOJAGGARTEST** is Pending Award. You may view the [scenario breakdown](#).

RFB Test 17011
005-RFB-0255-2023

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

Settings and Content >

Vendor Responses >

Tools ▾

- Internal Notes
- Exports and Imports
- 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) | Award To Supplier (Future) | Finish

Laura Shannon (View approvers)

Expedite (under Award To Supplier)

Expedite (under Finish)



Award

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

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

The screenshot displays a procurement system interface. At the top, a blue banner contains a red-bordered box with the text "Awarded" and "This event has been awarded to SOIJAGGAERTEST." Below this, the "Award Scenario for" section shows a "Load Saved Scenario" button and an "Export" dropdown. The "Scenario Navigator" includes "Scenario Breakdown" and "Scenario Savings" tabs. A "Sort Bids by:" dropdown is set to "Total Bid" with a secondary dropdown set to "Ascending". There are checkboxes for "Show Vendor Response Notes", "Expand All", and "Collapse All".

The "Awarded Scenario" section features a table with a red-bordered box around the "SOIJAGGAERTEST" vendor name and a green "Awarded" tag. Below this is a "Response Notes" section with a text area and a "1000 characters remaining" indicator, and an "Auto Score" section with a value of "0".

The "Vendor Responses" section is titled "RFB Test010" (005-RFB-0254-2023) and shows "Type: Request for Bids" and "Event Status: Awarded". It includes a "Vendor Responses" sidebar with a red-bordered box around the "Vendor Responses" link. The main area shows "1 Invited Vendors" with a table:

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

Additional elements include "Evaluation Actions", "Load Saved Scenario", "Event Actions", "History", "Evaluate Selected Responses", and a "Save Progress" button at the bottom right.





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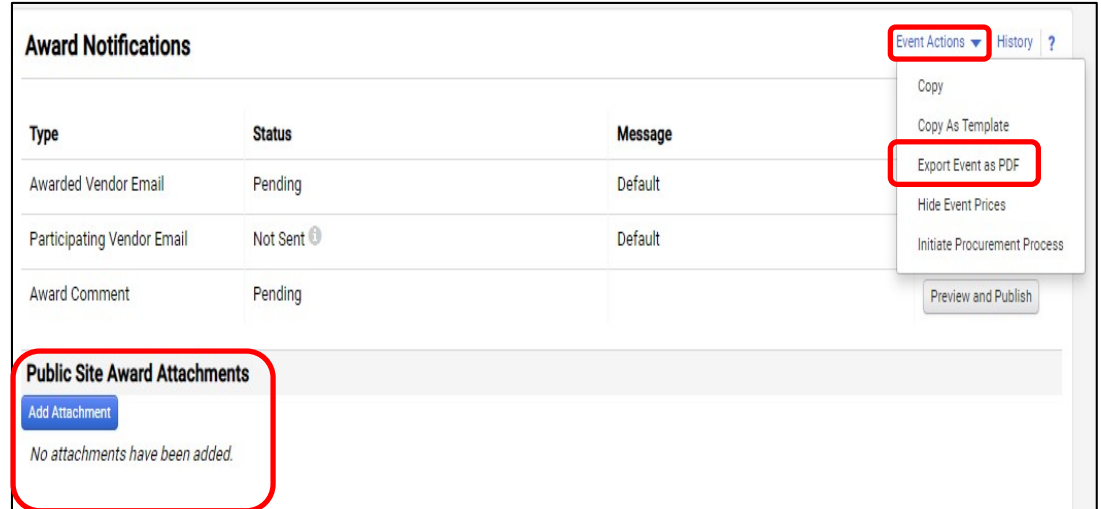
Export and Publish

Export and Publish

Under the **Tools/Award Notifications:**

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

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



The screenshot displays the 'Award Notifications' section of a software interface. It features a table with three columns: 'Type', 'Status', and 'Message'. Below the table is a section for 'Public Site Award Attachments' with an 'Add Attachment' button and a message stating 'No attachments have been added.' A dropdown menu is open for the 'Event Actions' button, listing options such as 'Copy', 'Copy As Template', 'Export Event as PDF', 'Hide Event Prices', and 'Initiate Procurement Process'. A 'Preview and Publish' button is also visible.

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.

Event Actions History ?

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

[Preview and Publish](#)



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Initiate Contract

Create a Contract from a Sourcing Event

Step-by-Step Contract Creation from Sourcing Event

RFB 17 TEST07
005-RFB-0249-2023

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

Settings and Content >

Vendor Responses ▾

Vendor Responses

Tools >

Vendor Responses

Event Actions ▾ History | ?

Evaluation Actions ▾ Load Saved Scenario

1 Invited Vendors Evaluate Selected Responses

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

Save Progress

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

From the Award Scenario Page, Select Scenario Breakdown

Award Scenario for RFB Test 020

Load Saved Scenario Export ▾ Remove Finalized Award

Scenario Navigator **Scenario Breakdown** Scenario Savings



Step-by-Step Contract Creation from Sourcing Event

The **Create Contract** link appears.

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

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

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

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

Award Scenario for RFB 17 TEST007 History | 📄 | ?


Load Saved Scenario | Export ▾

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

Awarded Total: 38,050.00

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

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



Step-by-Step Contract Creation from Sourcing Event

Complete these fields:

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

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

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

Step-by-Step Contract Creation from Sourcing Event

Complete these fields:

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

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

Click **Next**.

Create Contract

About the Contract (Step 1 of 2)

Contract Name *****

Contract Type *****

Use Contract Template Yes No

Contract Template *****

Department *****

***** Required

Next >



Step-by-Step Contract Creation from Sourcing Event

The **About the Contract** window opens.

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

Click **Create Contract**.

The screenshot shows a web interface for creating a contract. The window title is "Create Contract" with a close button (X) in the top right corner. Below the title bar, there is a breadcrumb-style header "About the Contract (Step 2 of 2)" with a question mark icon to its right. The main content area contains the label "Items to Include in Contract" followed by a red star indicating it is required. To the right of this label are three radio button options: "None", "All Items to be Awarded to this Vendor" (which is selected), and "Let Me Pick". A large red arrow points from the text "Select the Items to be included in this Contract by clicking on the appropriate radio button." to the selected radio button. At the bottom of the window, there is a footer area with a red star and the text "Required" on the left, a "Previous" button with a left arrow in the center, and a blue "Create Contract" button on the right. The "Create Contract" button is highlighted with a red rectangular box.

Step-by-Step Contract Creation from Sourcing Event

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

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

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

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

Award Scenario for RFB 17 TEST007 History | 📄 | ?

Load Saved Scenario Export ▾

Scenario Navigator Scenario Breakdown Scenario Savings

Awarded Total: 38,050.00

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

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





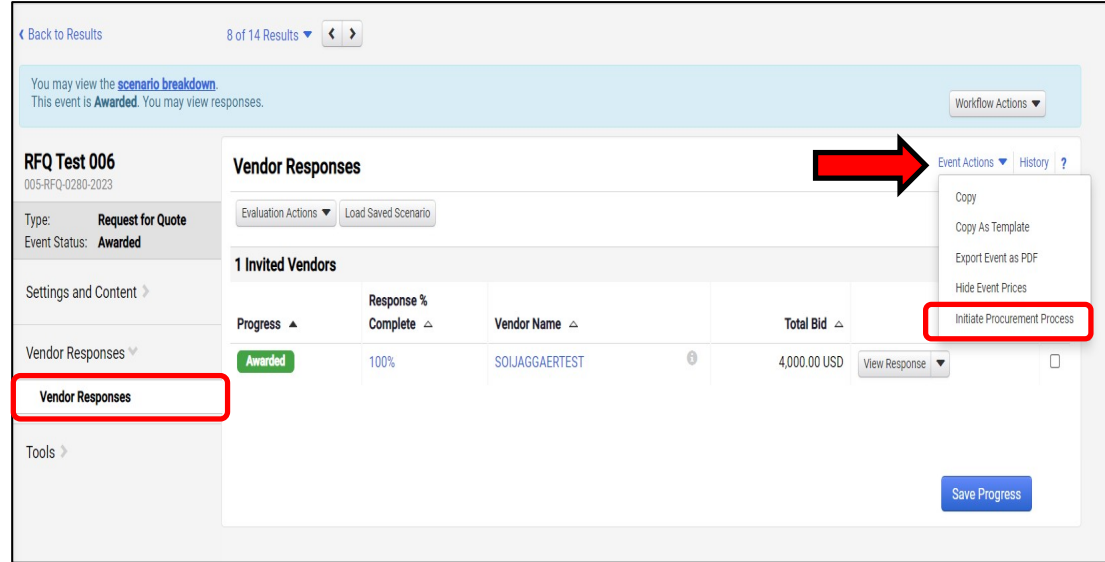
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Initiate Procurement Process

Initiate Procurement Process

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



The screenshot displays the 'Vendor Responses' section for 'RFQ Test 006' (005-RFQ-0280-2023). The event status is 'Awarded'. The interface includes a 'Vendor Responses' sidebar menu, a '1 Invited Vendors' 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 within the menu.

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

Initiate Procurement Process

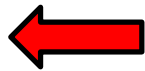
The Confirm Procurement Request Popup appears. Verify that your name is correct.

When done select **Continue**.

Confirm Procurement Request ✕

Create Shopping Cart from Awarded Event.

Prepared by/for User ★ Change User

Shannon, Laura 

★ Required Continue Close



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Create a Purchase Requisition

Purchase Requisition (PR)

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

Dashboards • Shop Dashboard - LS



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

Shop

Simple Advanced

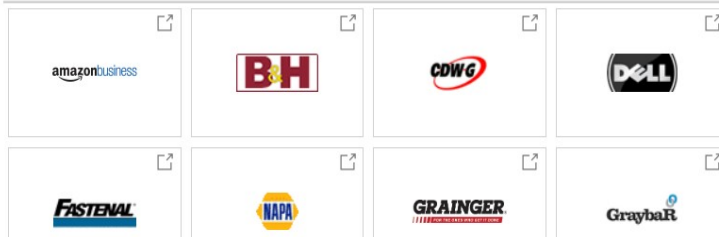
Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | [Service Item](#) | [Quick Order](#) Browse: [Vendors](#) | [Categories](#) | [Contracts](#)

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



Showcases

PunchOut Catalogs



My Draft Carts

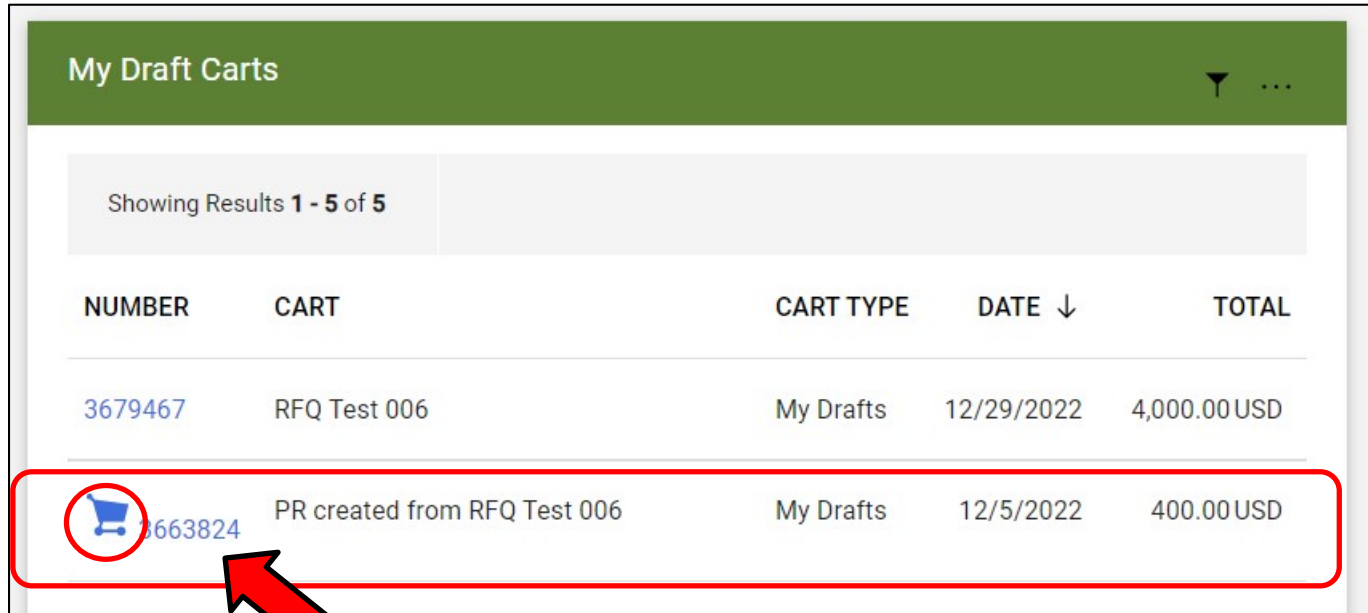
Showing Results 1 - 5 of 5


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



Purchase Requisition (PR)

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



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

Purchase Requisition (PR)

Check that the information is correct on the PR lines.

Check if the Commodity Code is correct.

Enter a name for the Purchase Requisition.

Select Proceed to Checkout.

Shopping Cart • 3663824

Assign Cart **Proceed To Checkout**

Simple Advanced

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

10 Items

SOIJAGGAERTEST • 10 Items • 400.00 USD

VENDOR DETAILS

Phone No. +1 515-330-7325

Fax No.

E-mail SOIJAGGAERTEST@gmail.com

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

ITEM DETAILS

Commodity Code 10011

Details

For Laura Shannon

Name PR created from RFQ Test 006

Total (400.00 USD)

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


Total: 400.00

Purchase Requisition (PR)

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

Requisition • 3663824

Summary PO Preview Comments 1 Attachments History

General  ...

Cart Name PR created from RFQ Test 006


Description *no value*

Priority Normal

Prepared by Laura Shannon

Prepared for Laura Shannon

Department Department of Administrative Services (005)

Shipping  ...


Ship To

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

Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date *no value*


Billing  ...

Bill To


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

Billing Options

Accounting Date *no value*


Accounting Codes  ...

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

Internal Notes and Attachments  ...

Internal Note *no value*

Internal Attachments [Add](#)

External Notes and Attachments  ...

Note to all Vendors *no value*

Attachments for all vendors [Add](#)

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

10 Items ...

SOIJAGGAERTEST • 10 Items • 400.00 USD ...

Draft

Total (400.00 USD)

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

Subtotal 400.00

400.00

What's next for my order?

Next Step Department Approval

Approvers Meyer, Allen
Pulley, Bobbi
Wendt, Karl

Workflow

Show skipped steps

Draft
Active
Laura Shannon

Department Approval
Future ...

Create PO
Future ...

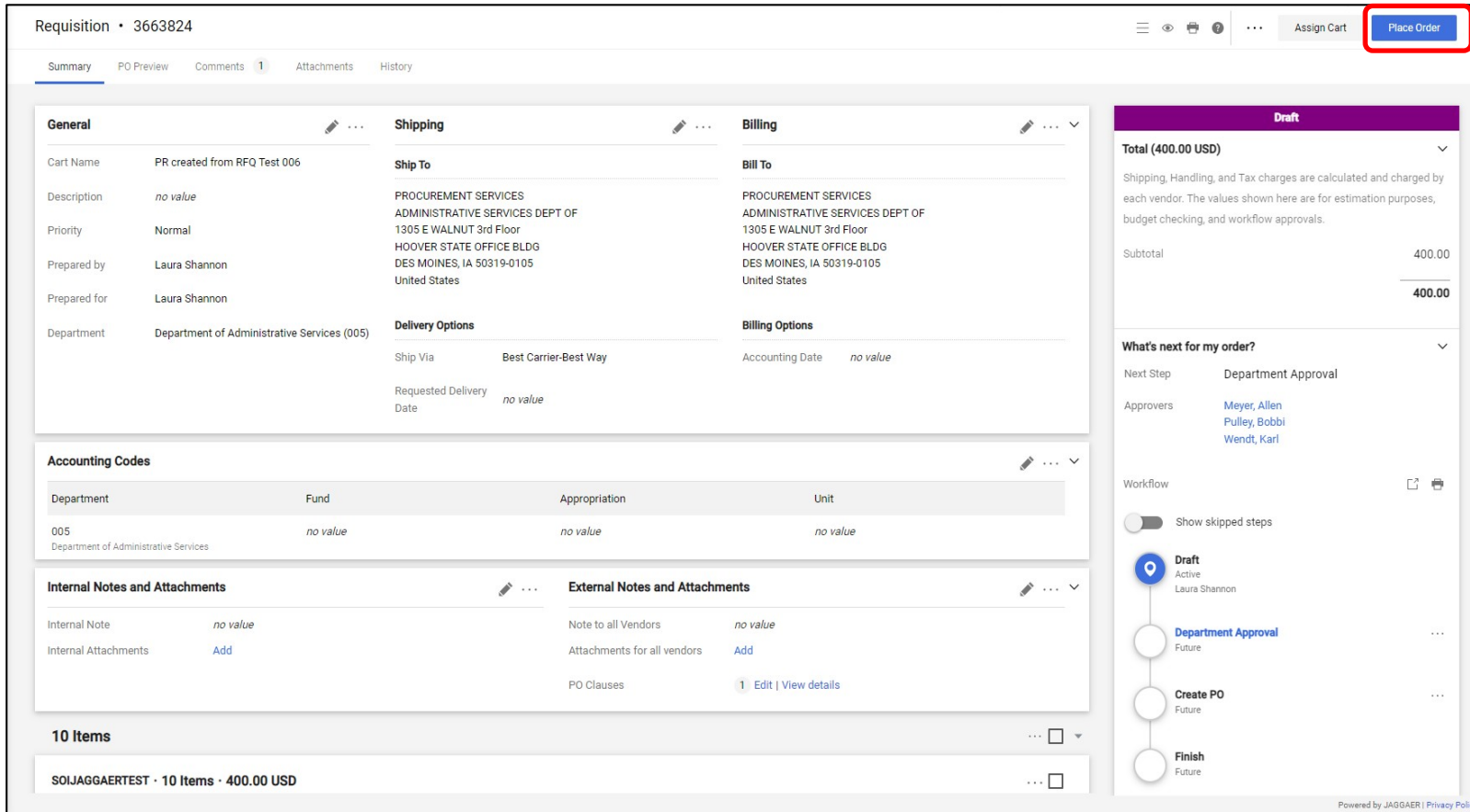
Finish
Future

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Purchase Requisition (PR)

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



Requisition • 3663824

Summary PO Preview Comments 1 Attachments History

General **Shipping** **Billing**

Cart Name PR created from RFQ Test 006

Description *no value*

Priority Normal

Prepared by Laura Shannon

Prepared for Laura Shannon

Department Department of Administrative Services (005)

Ship To

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

Bill To

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

Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date *no value*

Billing Options

Accounting Date *no value*

Accounting Codes

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

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

Internal Note *no value*

Internal Attachments [Add](#)

Note to all Vendors *no value*

Attachments for all vendors [Add](#)

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

10 Items

SOIJAGGAERTEST • 10 Items • 400.00 USD

Draft

Total (400.00 USD)

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

Subtotal 400.00

400.00

What's next for my order?

Next Step Department Approval

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

Workflow

Show skipped steps

Draft
Active
Laura Shannon

Department Approval
Future

Create PO
Future

Finish
Future

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Purchase Requisition (PR)

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

Draft

Total (400.00 USD) ▼

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

Subtotal	400.00
	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.

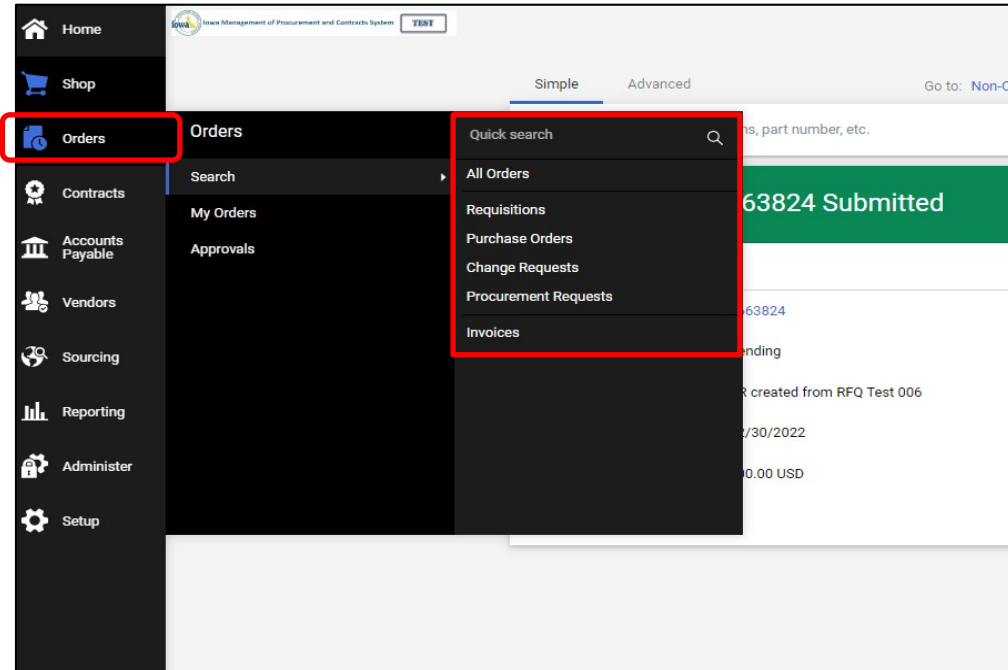
✔ Requisition 3663824 Submitted

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.





**Department of
Administrative Services**

*Empowering People
Collaboration
Customer Service*

Questions?

Contact:

Laura Shannon

515-330-7325

laura.shannon@iowa.gov