Department of Administrative Services

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IMPACS(Jaggaer)RFB

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

Table of Contents

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

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.

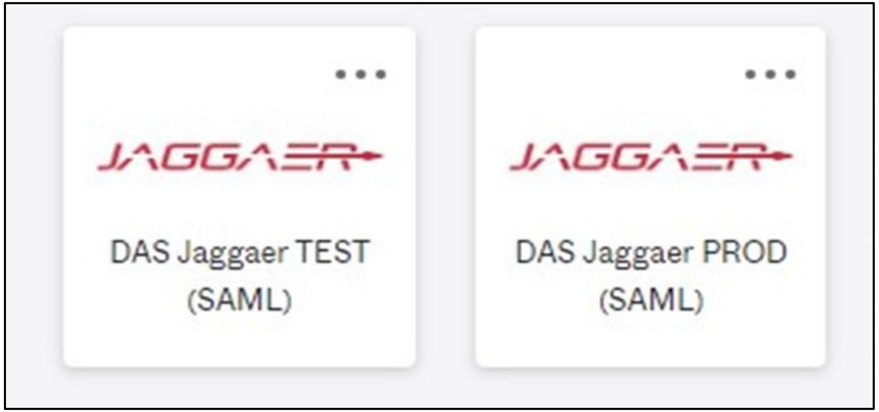
The competitive sealed bid process includes the following steps:

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)

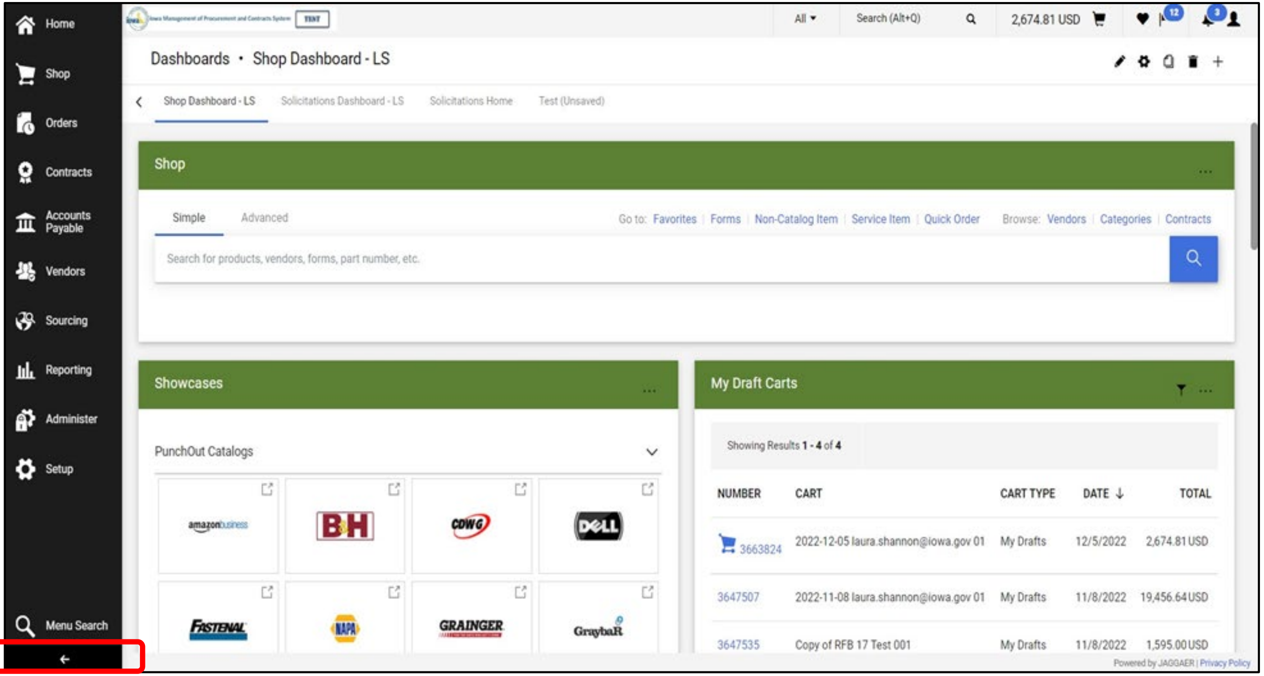
Post all solicitations to the TSB web page at least 48 hours prior to a general posting in IMPACS. The password to the TSB web page changes monthly; each agency shall assign an employee current access to the web page.

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.

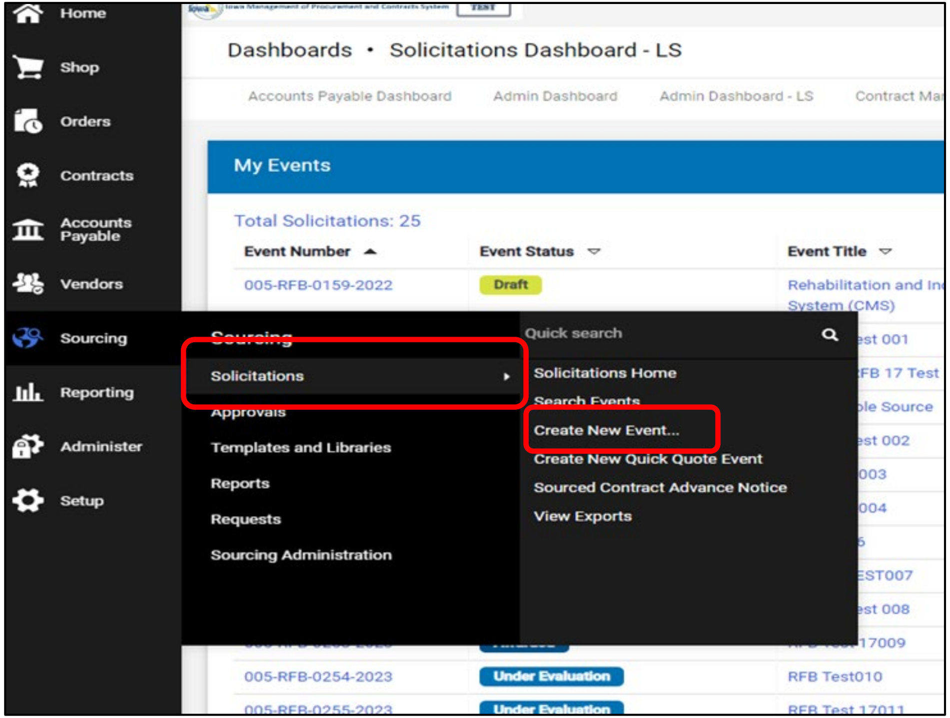
Left Menu Descriptions



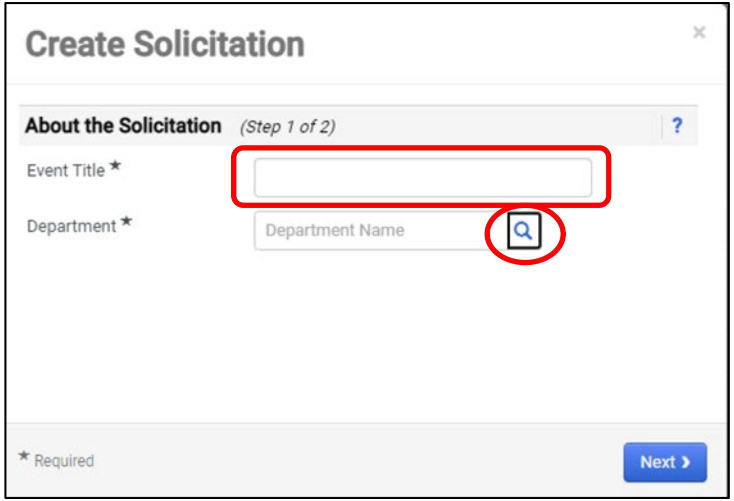
Expand to see icon labels by clicking on the small arrow at the bottom.

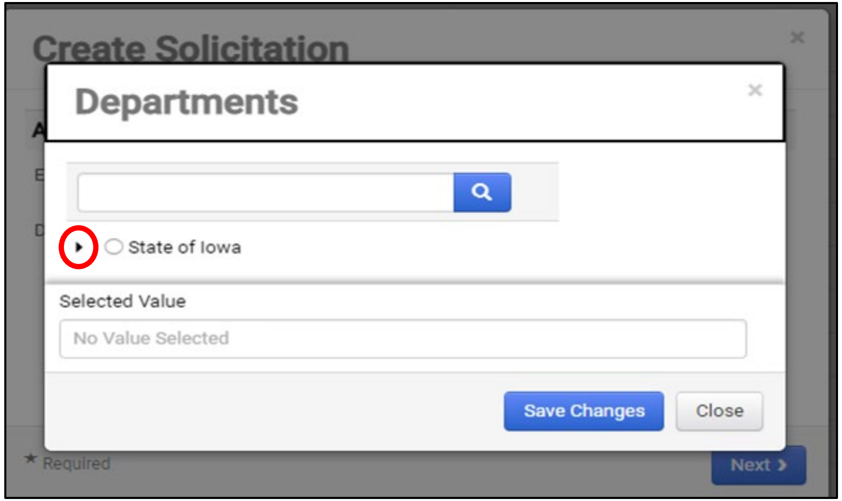
Create New Event

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



Create Solicitation





1. Enter the **Title** of the RFB.

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

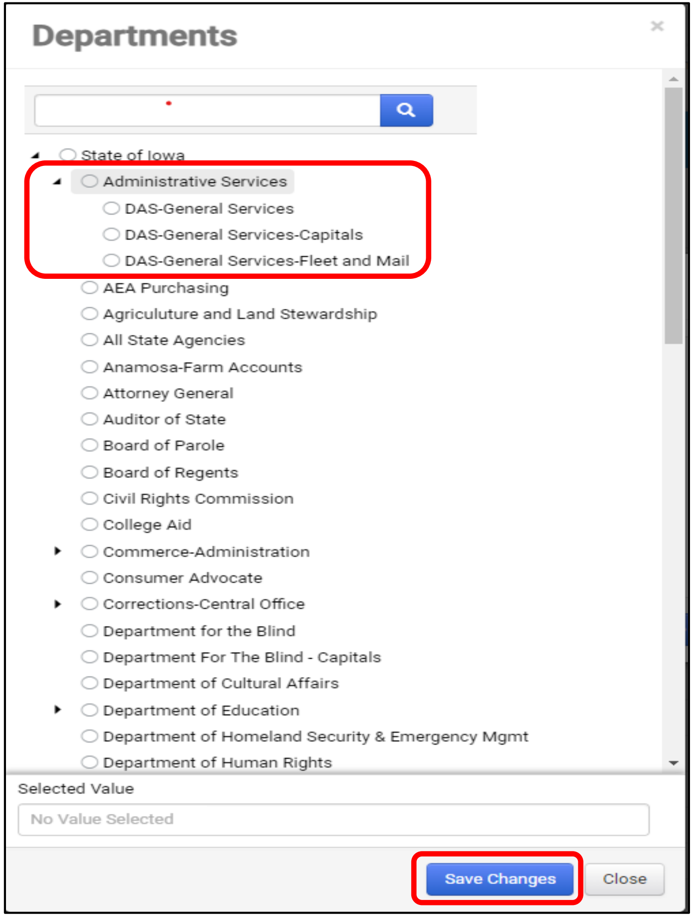
3. Expand the small arrow to see a drop-down menu of all State of Iowa Departments.

Adding Department (Agency)

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

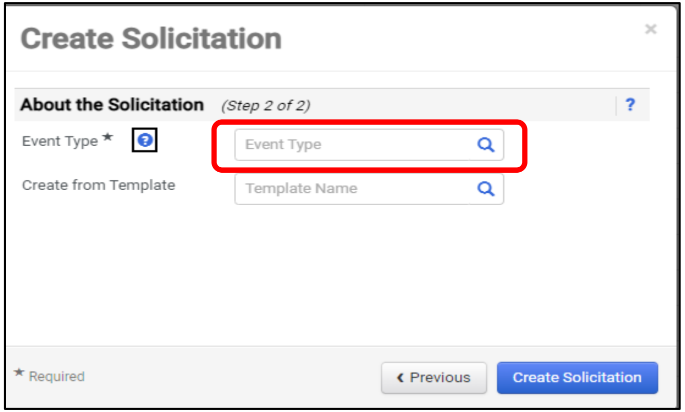
Click on the radio button next to the Department associated with the RFB.

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

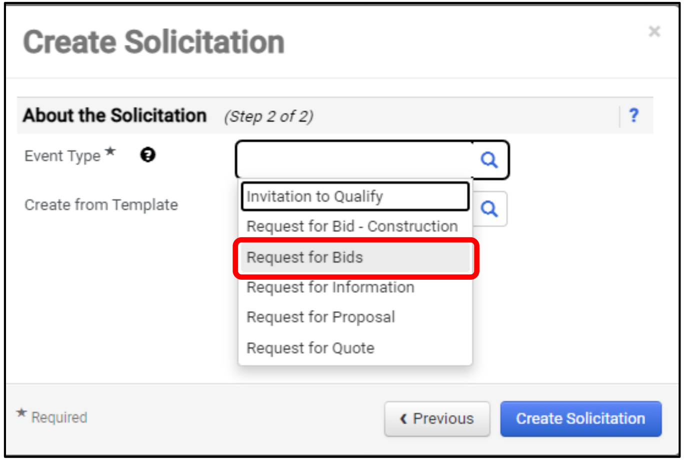


About the Solicitation

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



Select **Request for Bids**

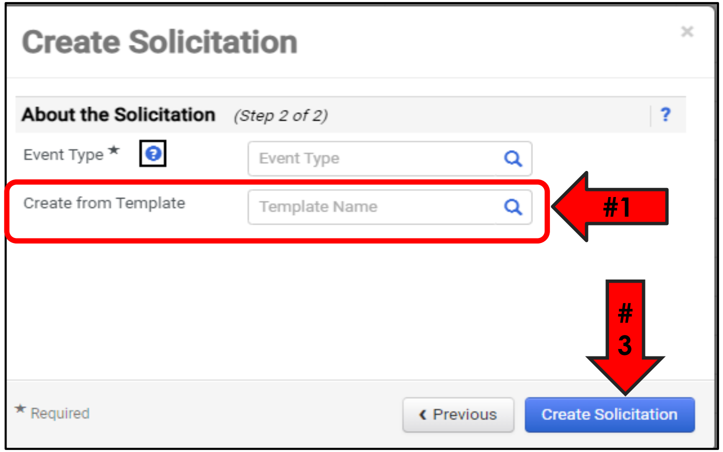


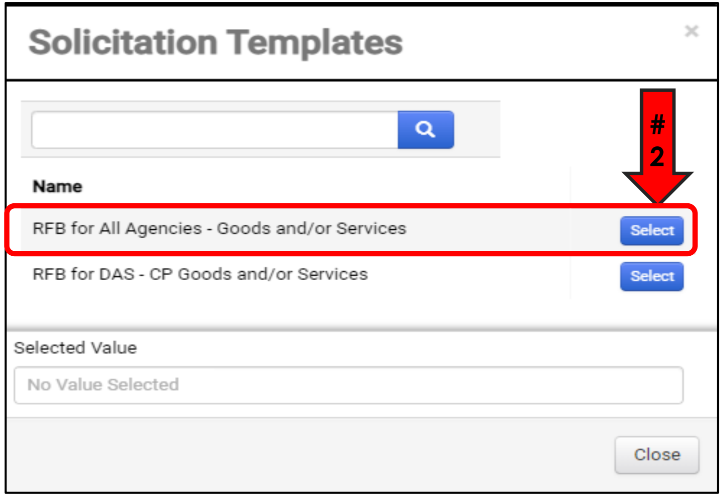
Create from Template

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.**





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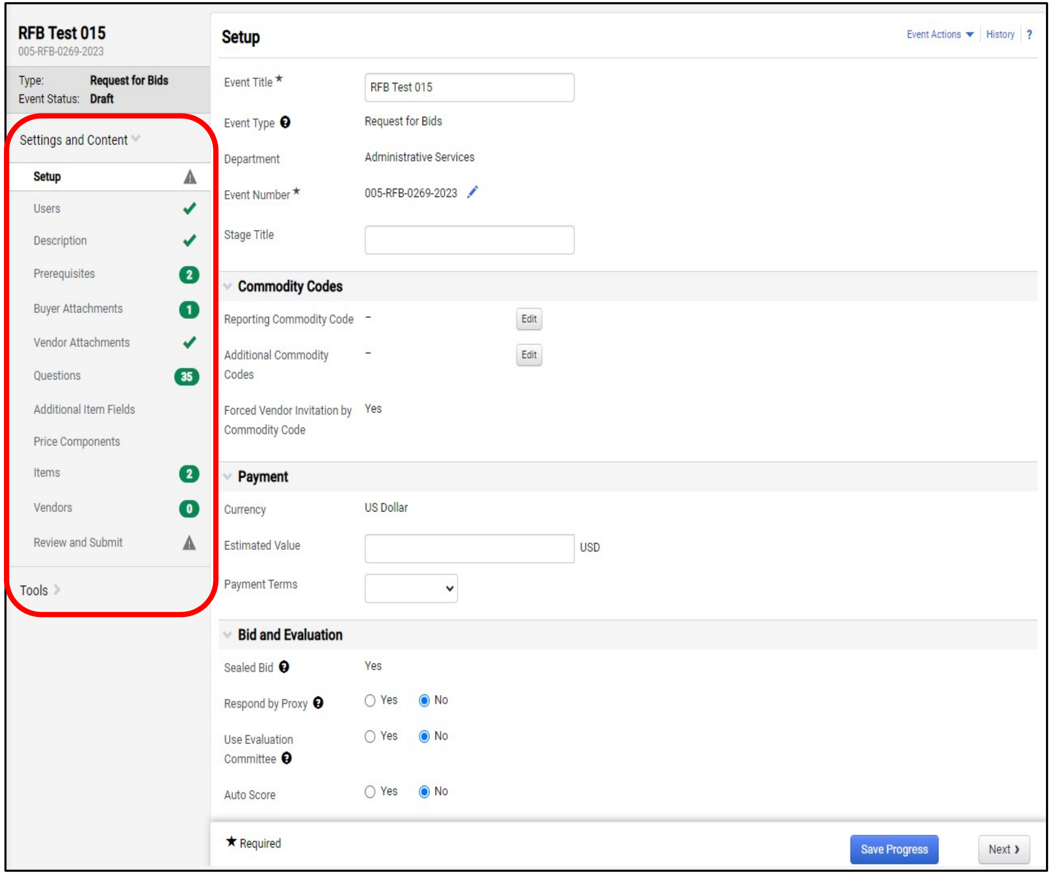
Setup Wizard

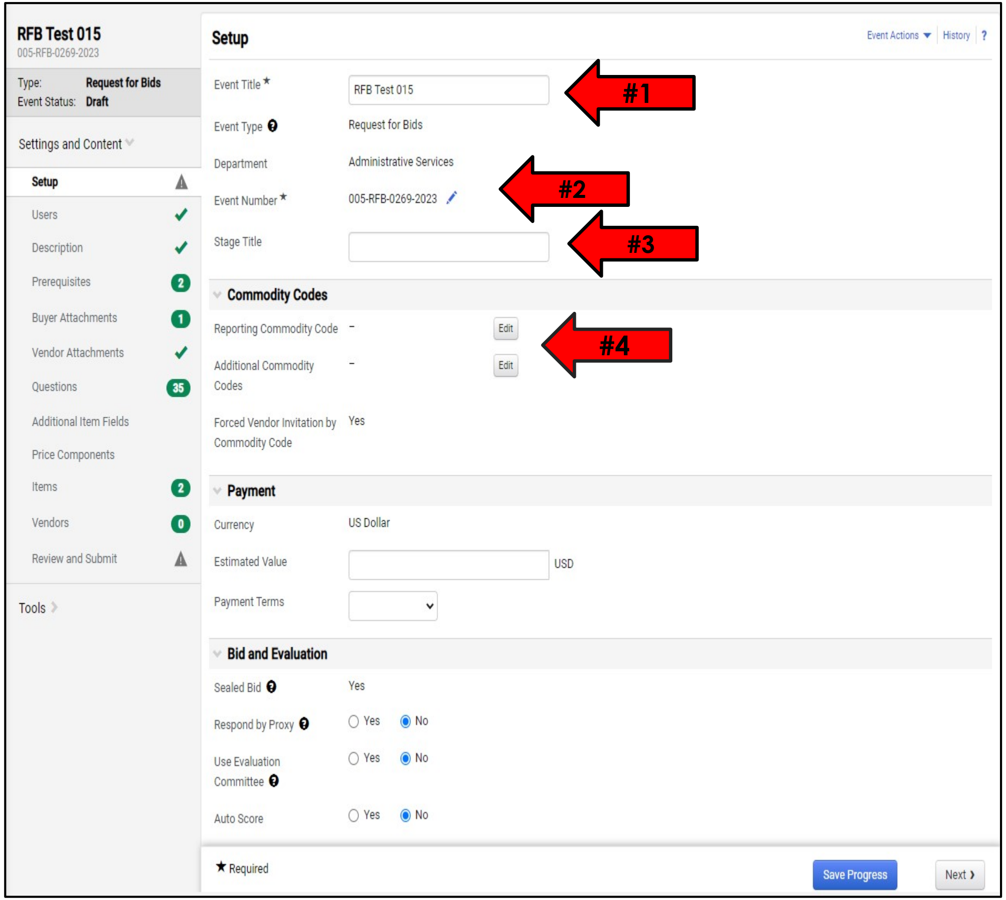
Settings and Content

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



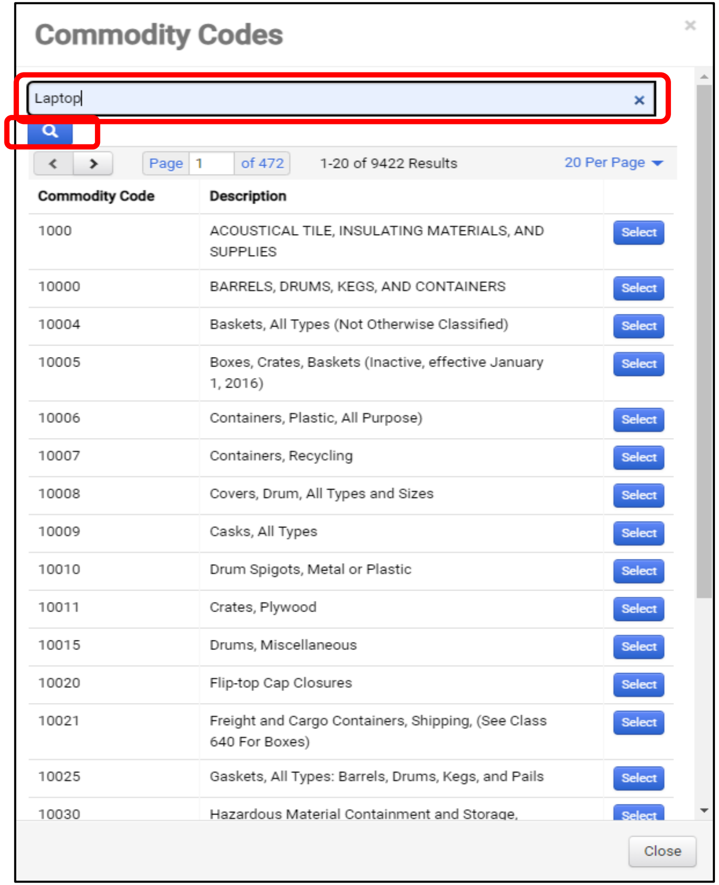
Setup

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.



Setup – Commodity Codes

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

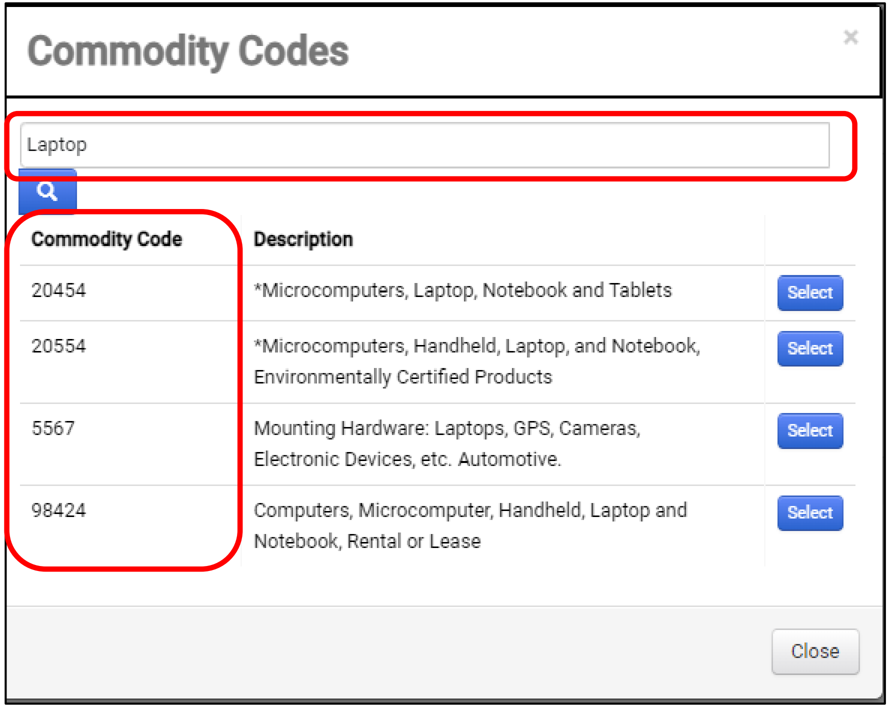


Setup – Commodity Codes

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

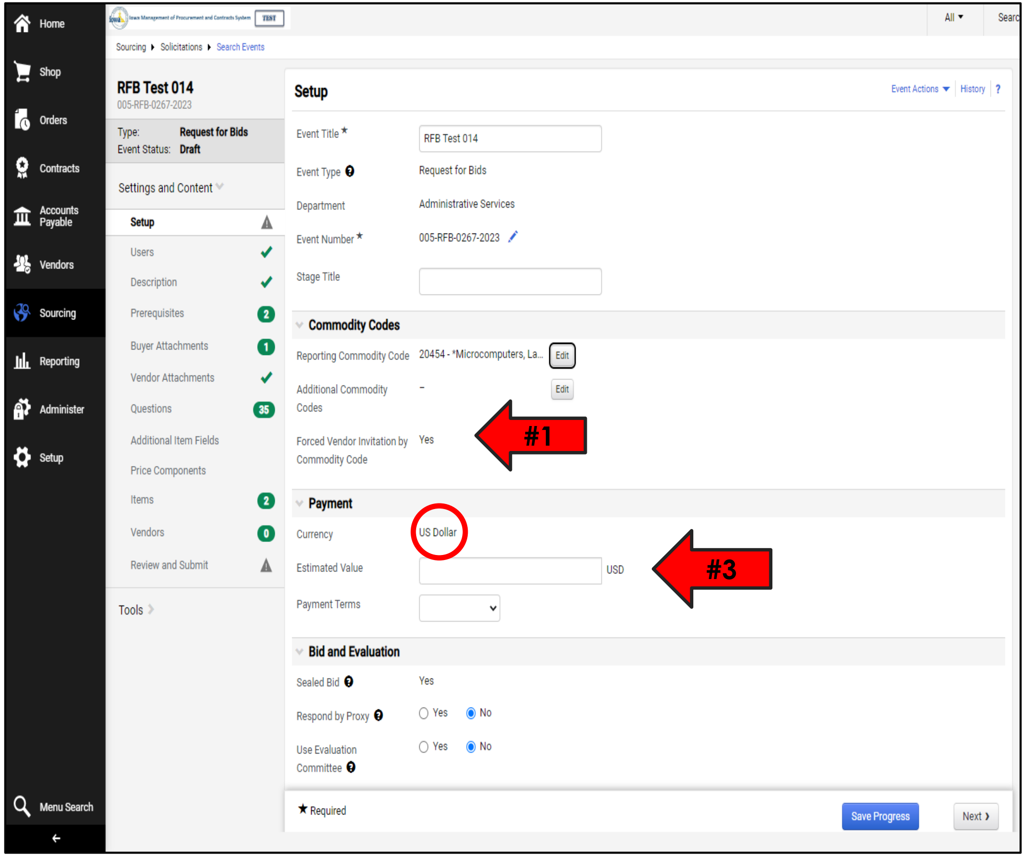
Select the Commodity Code that best fits your RFB.

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

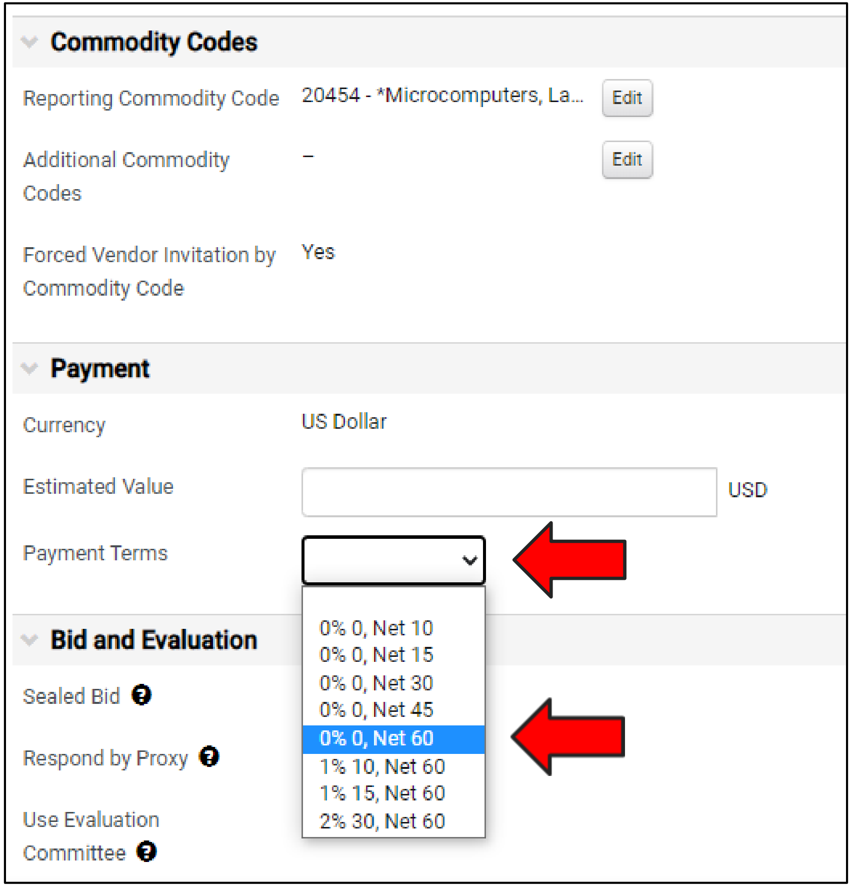


Setup – Commodity Codes & Payment

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.



Setup -Payment



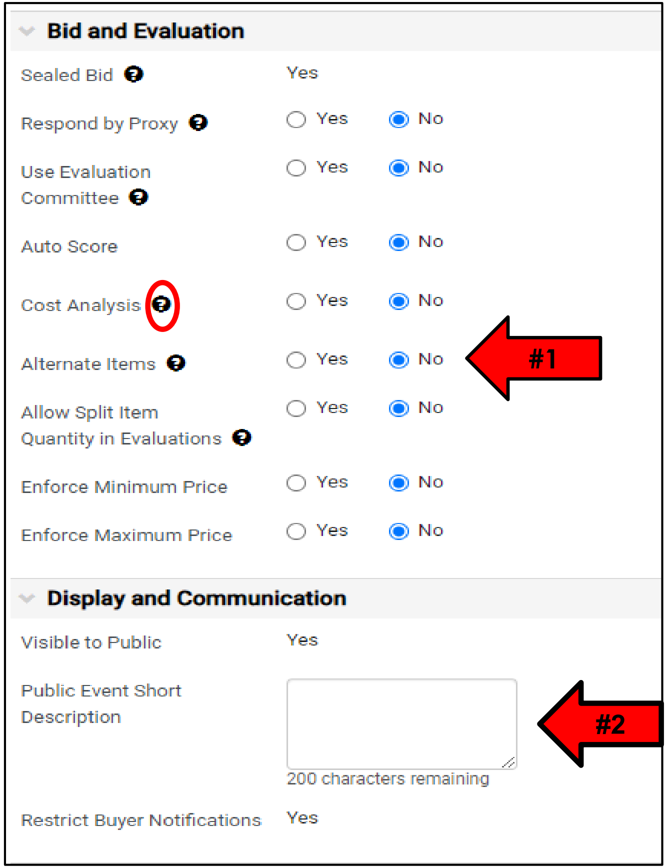
Enter the Payment Terms from the drop-down menu. **Net 60** is standard by the State of Iowa Code.

Setup - Bid and Evaluation & Display and Communication

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

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

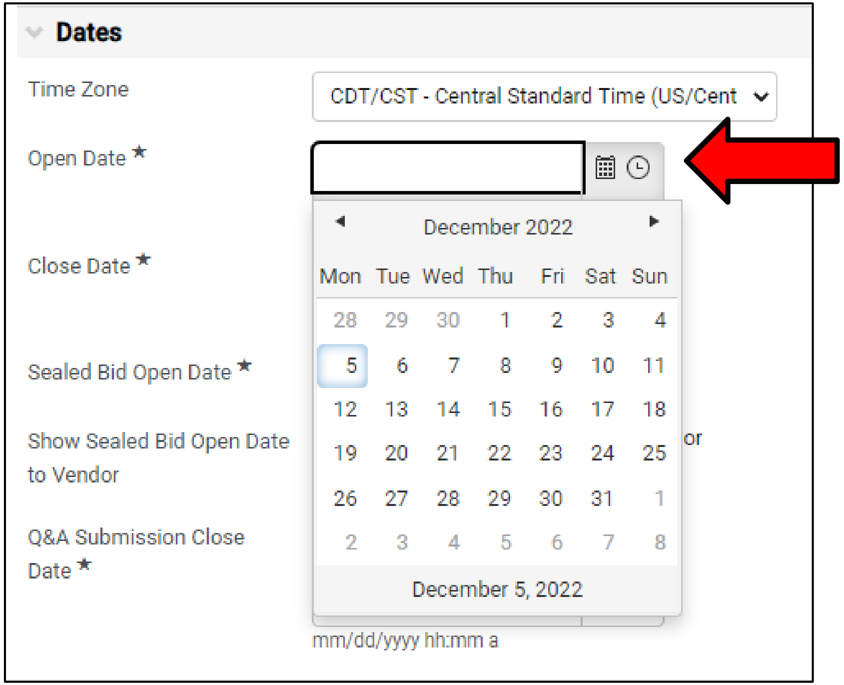
2. Include a brief description of the Goods and/or Services you seek.



Setup - Dates

Select the date the 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.



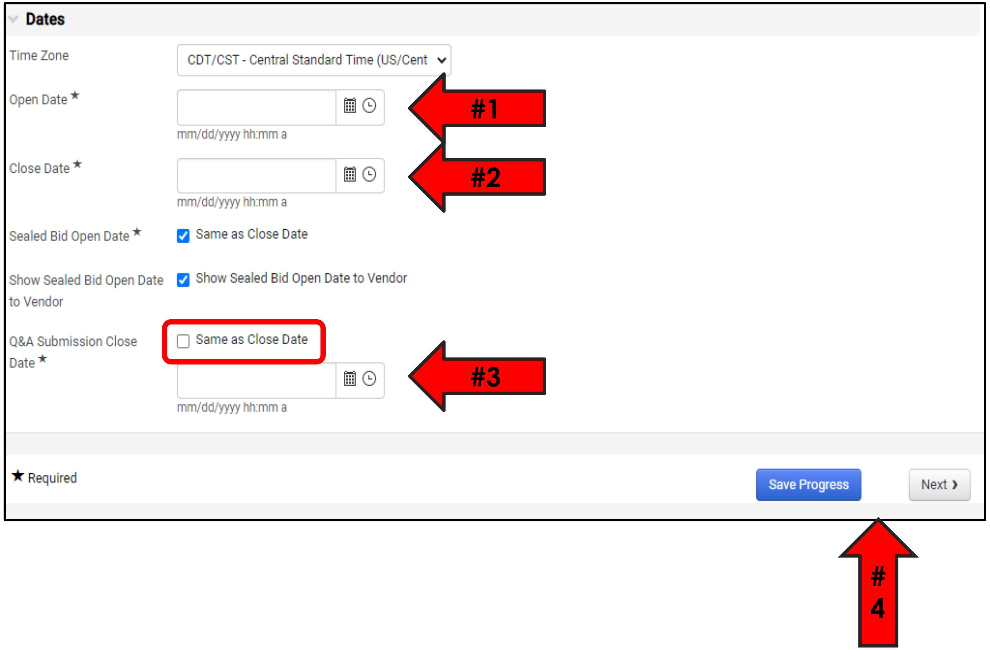
Setup – Dates & Next Section in the Wizard

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.



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Users

Add & Edit Users

Users

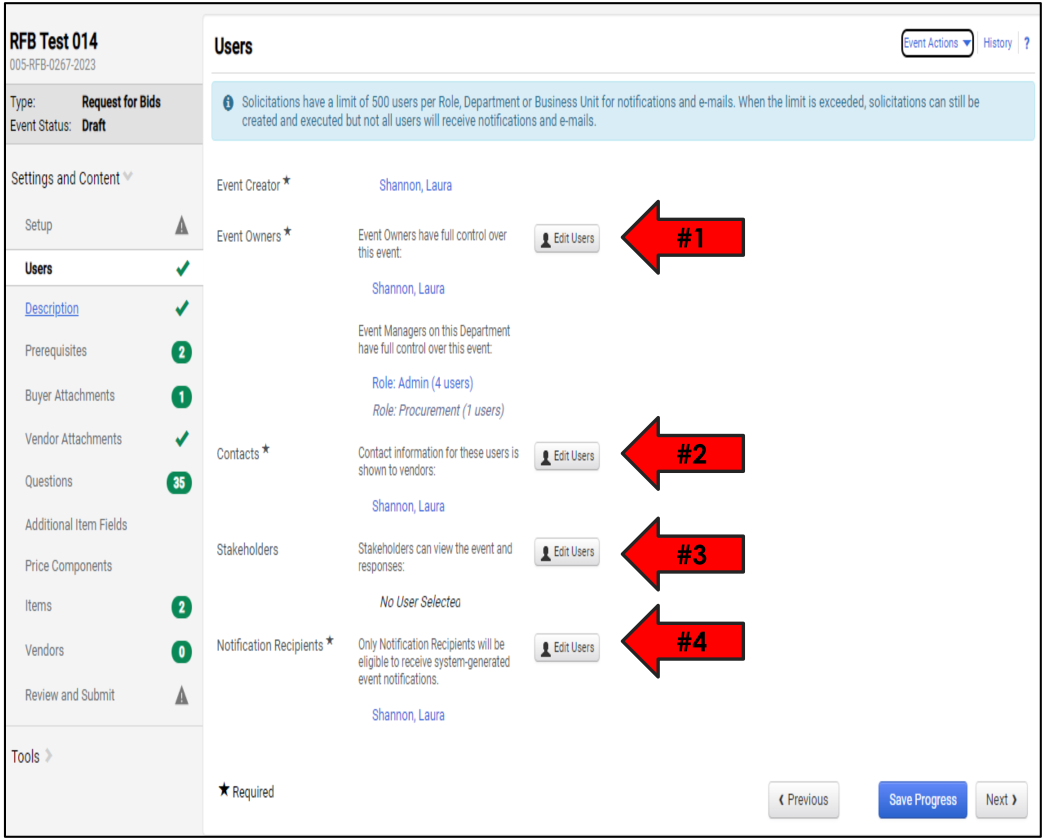
The Buyer may add Users for access to the RFB.

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.



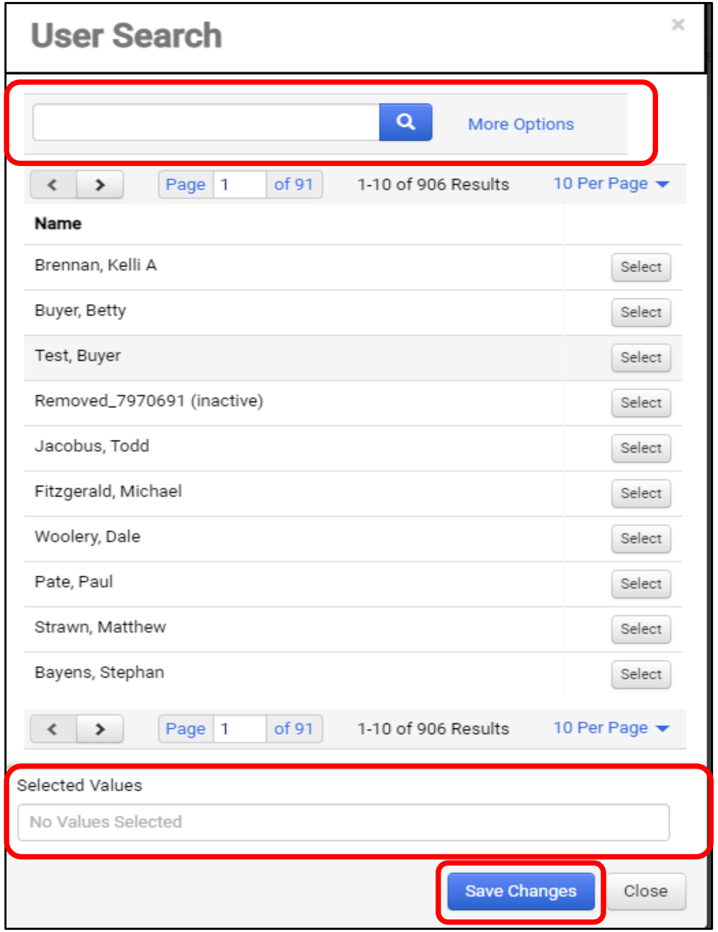
Users – User Search

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

The **Event Creator** and the additional **User** will show in the Selected Values box.

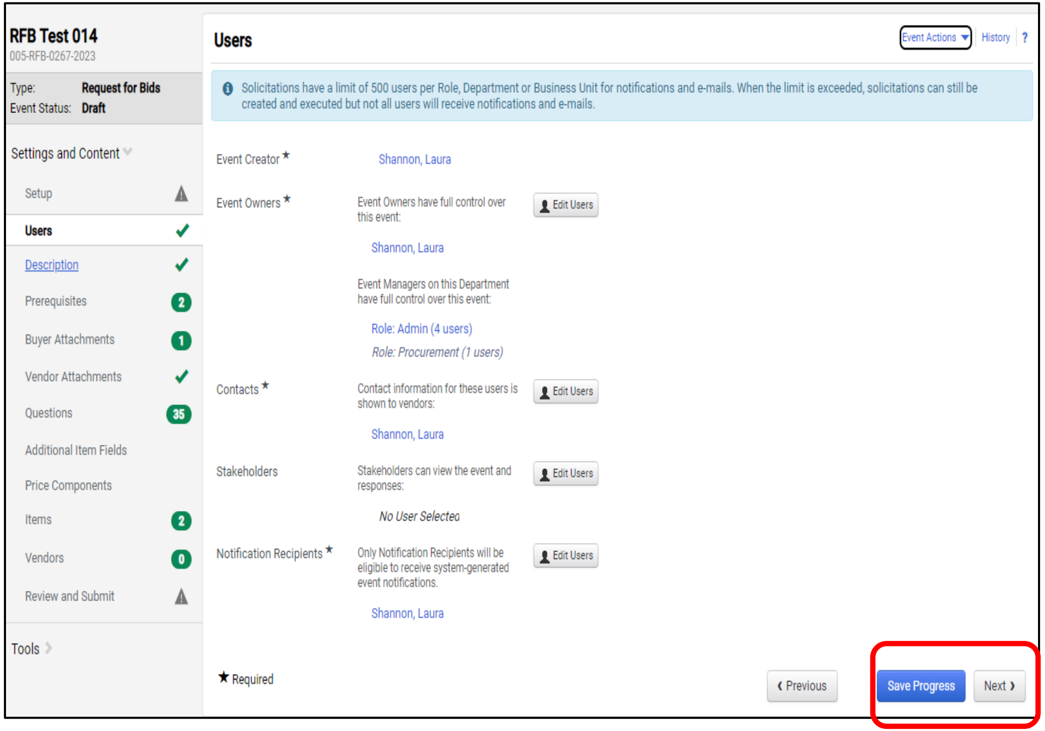
You may delete the selections by clicking the **Remove** button next to the name.

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



Users - continued

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



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Description

Description

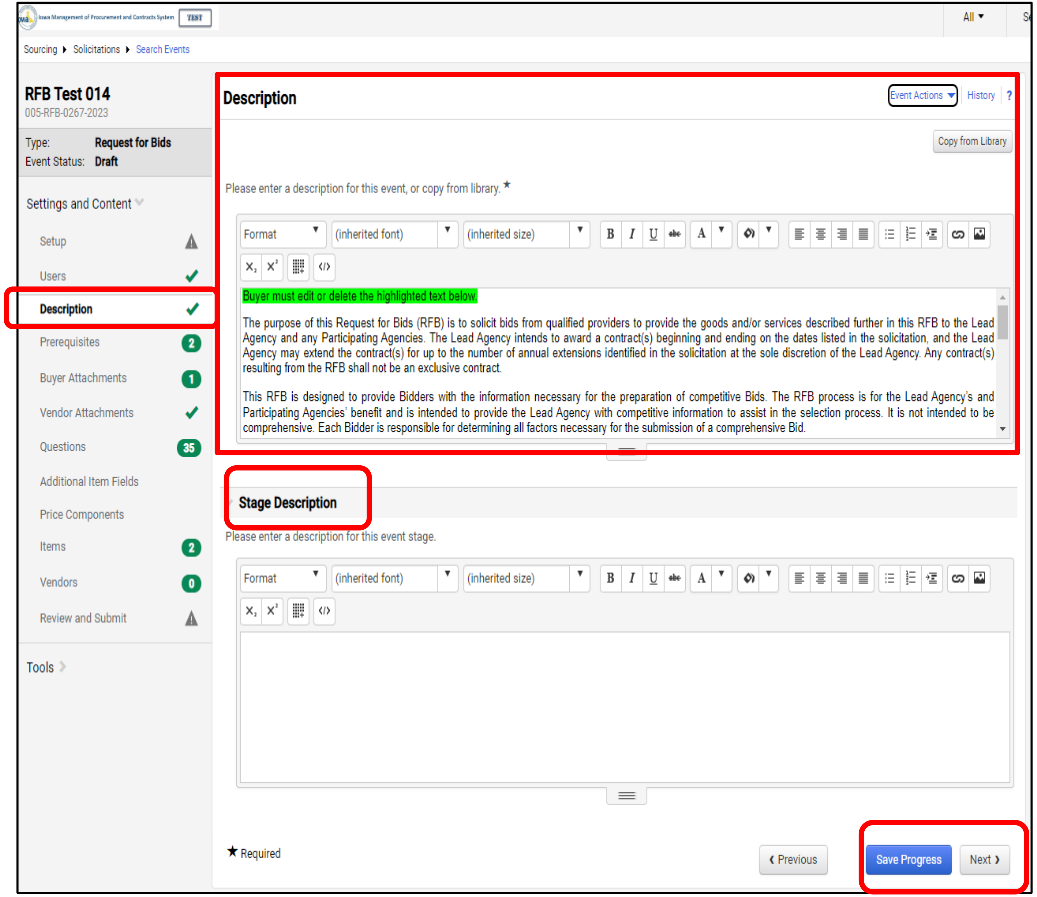
The **Description** Field is filled out with general information.

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

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

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

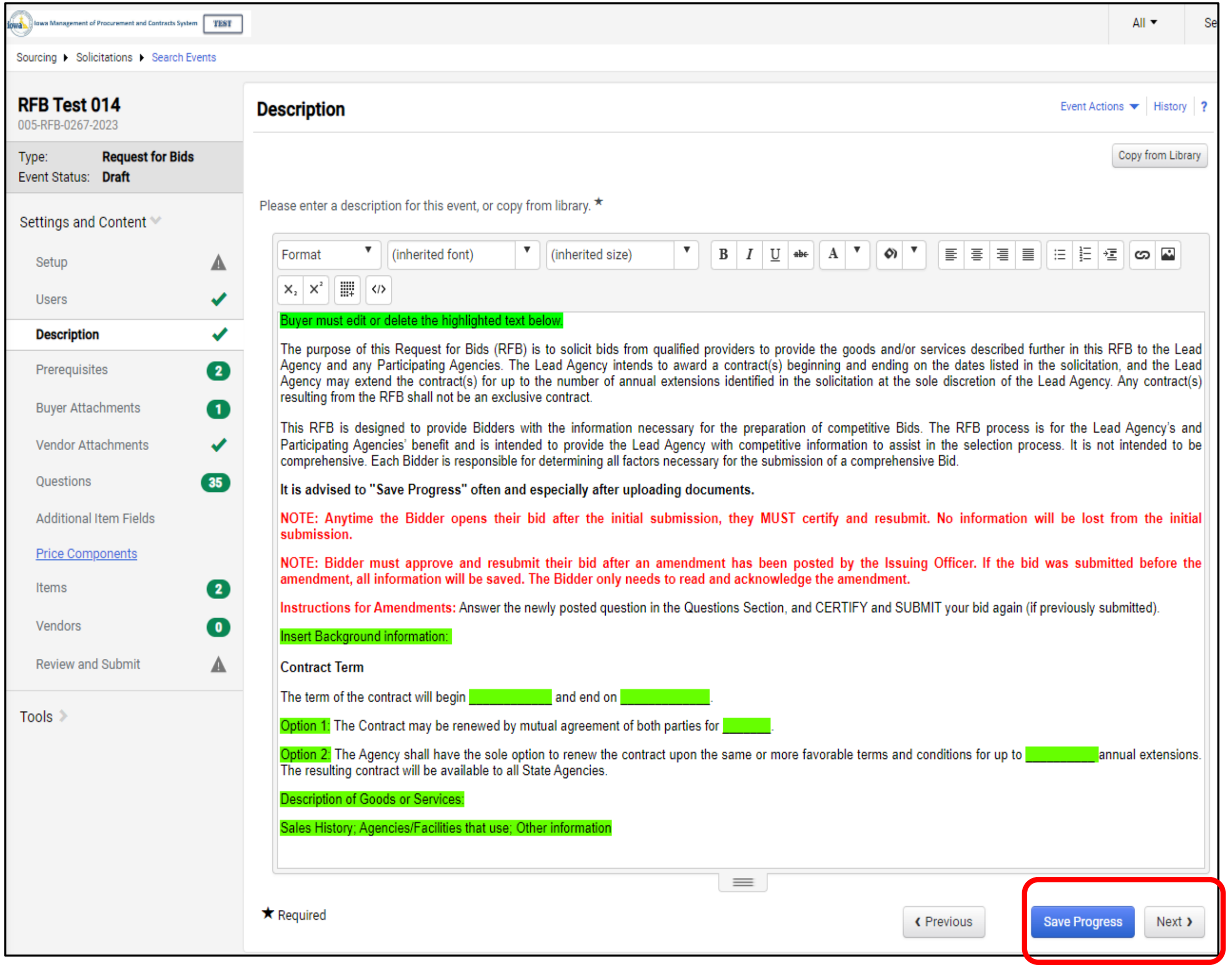
Ignore the **Stage Description** – it is not used.



Description

Here is what the full pre-loaded **Description** looks like.

Once the changes have been made, **Save Progress**, or click **Next** to move to the next Section.



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Prerequisites

Add, Edit & Delete

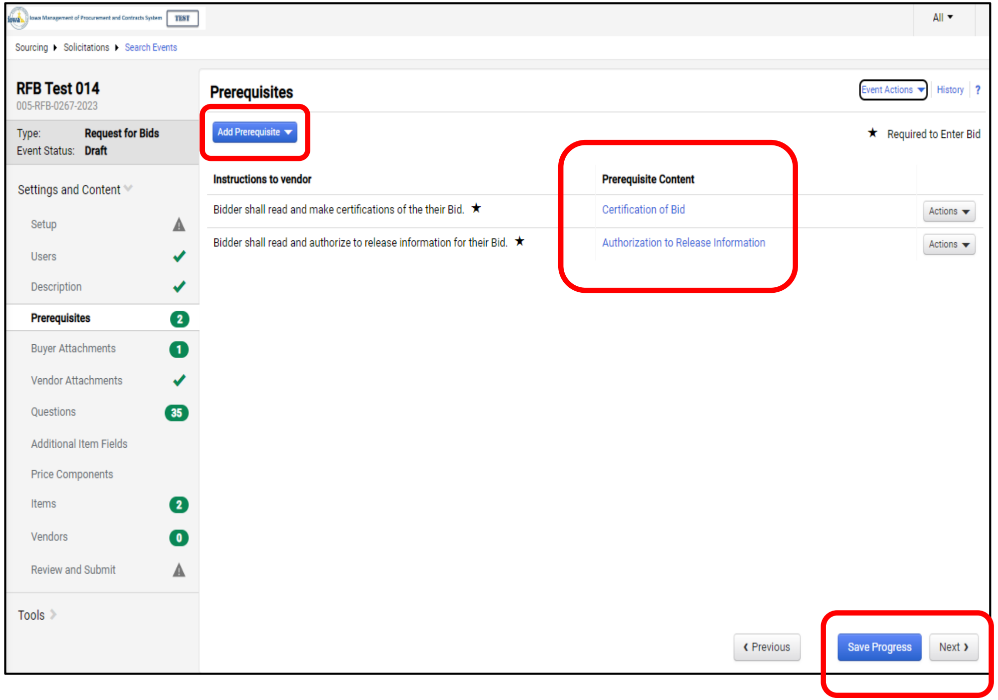
Prerequisites

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.



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:

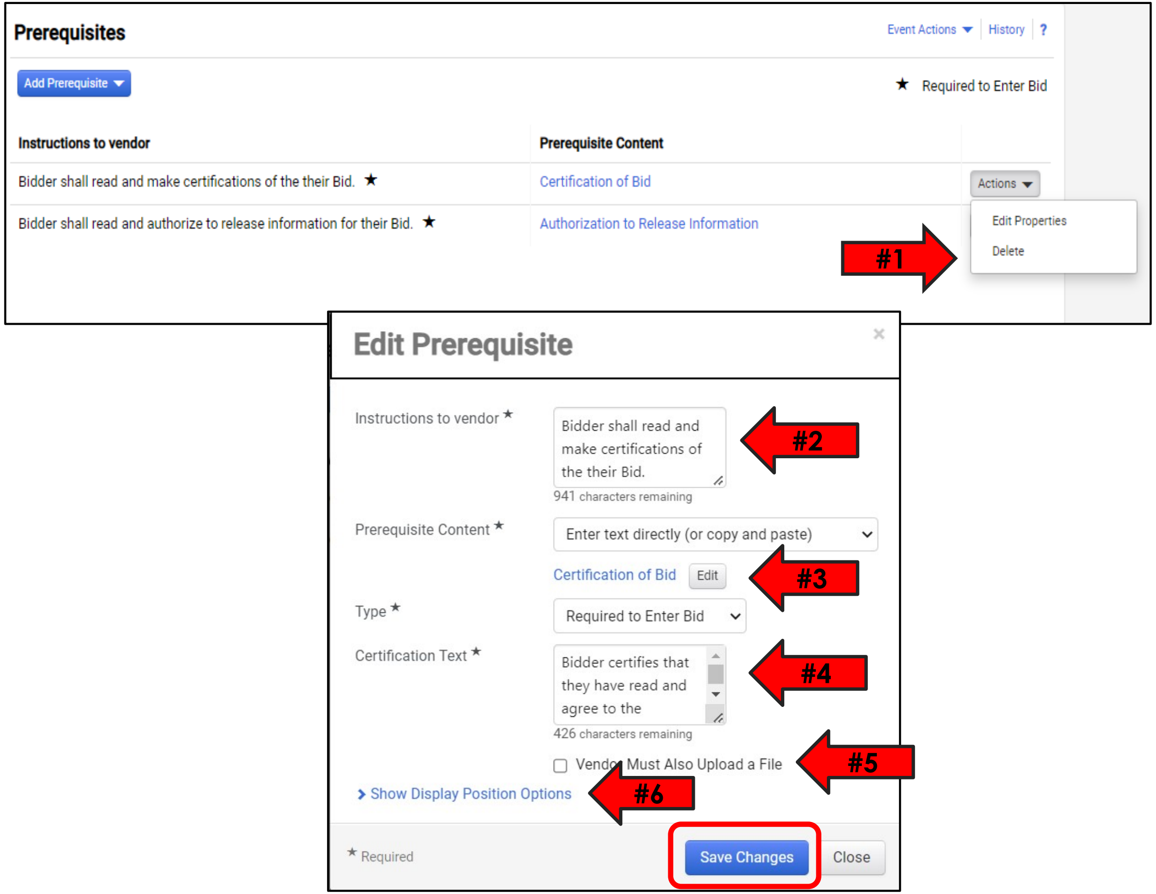
- Bidder is registered with the Iowa Department of Revenue, collects, and remits Iowa sales and use taxes as required by *Iowa Code chapter 423*; **OR**
- Bidder is not a "retailer" or a "retailer maintaining a place of business in this state" as those terms are defined in *Iowa Code subsections 423.1(47)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

Bidder also acknowledges that the Agency may declare the Bidder's Bid or resulting contract void if the above certification

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**



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Buyer Attachments

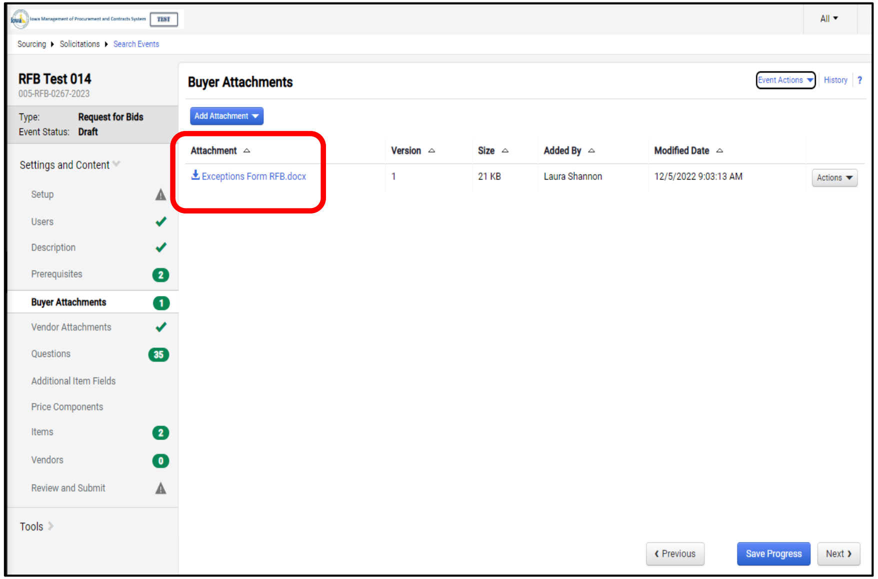
Location for Purchasing Agent/Issuing Officer Attachments to the Bidder

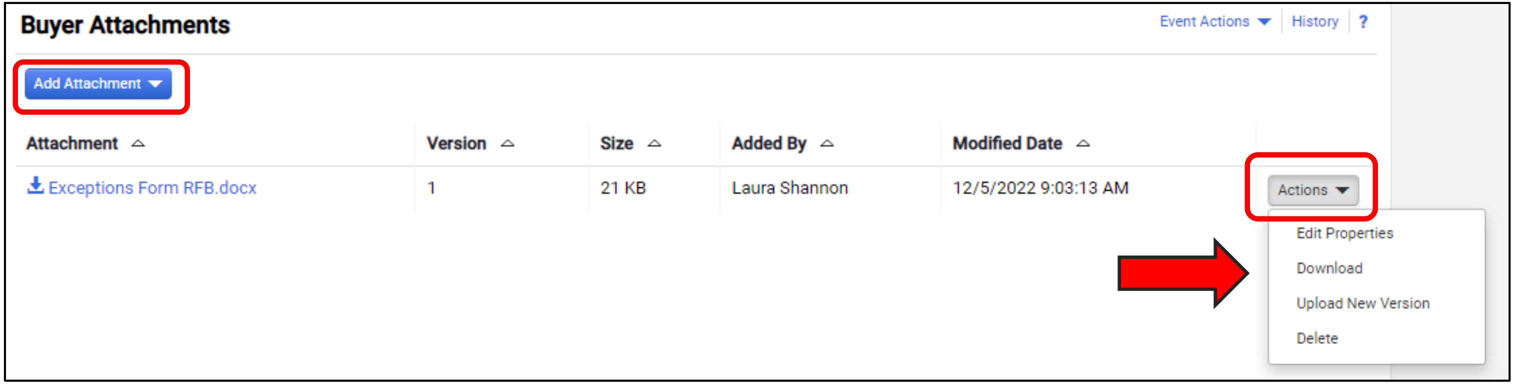
Buyer Attachments

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.





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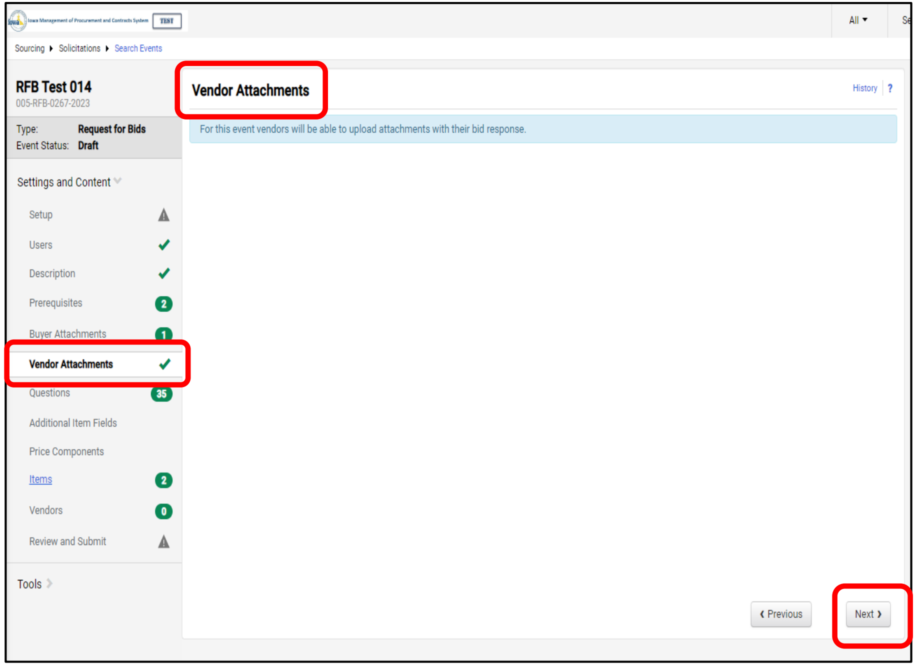
Vendor Attachments

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.



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Questions Section

Overview

Questions Section

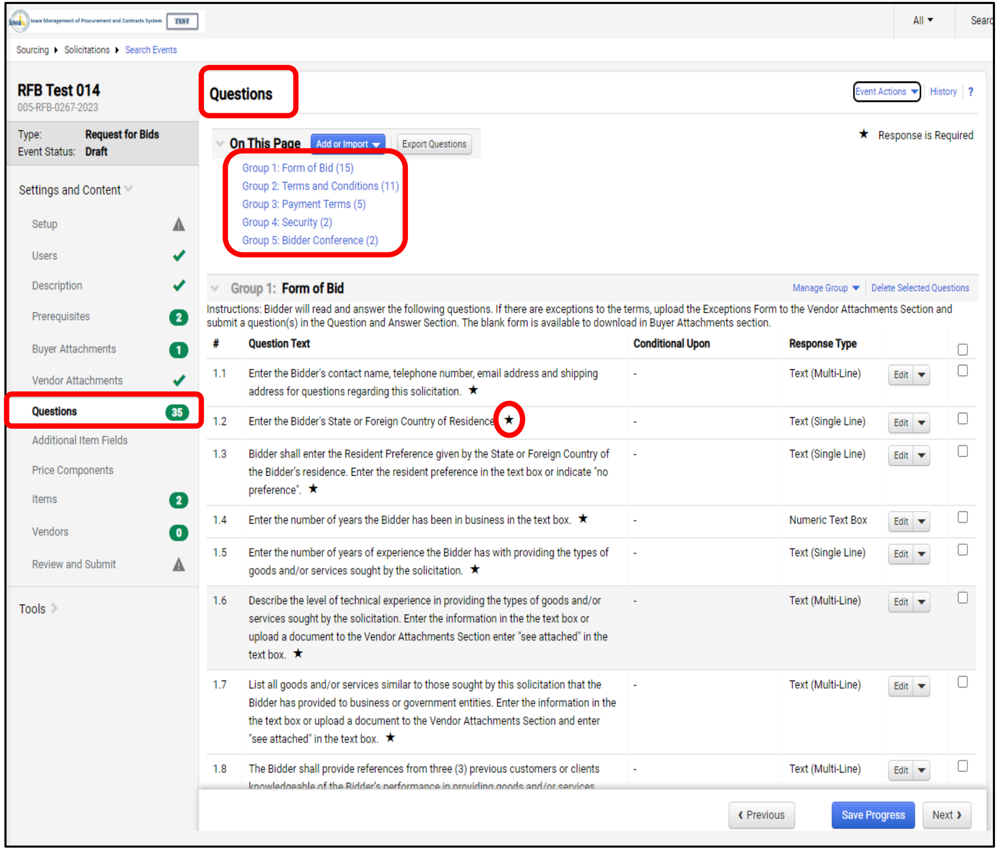
The **Questions Section** asks the Bidder to provide information or respond to the Terms and Conditions.

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.

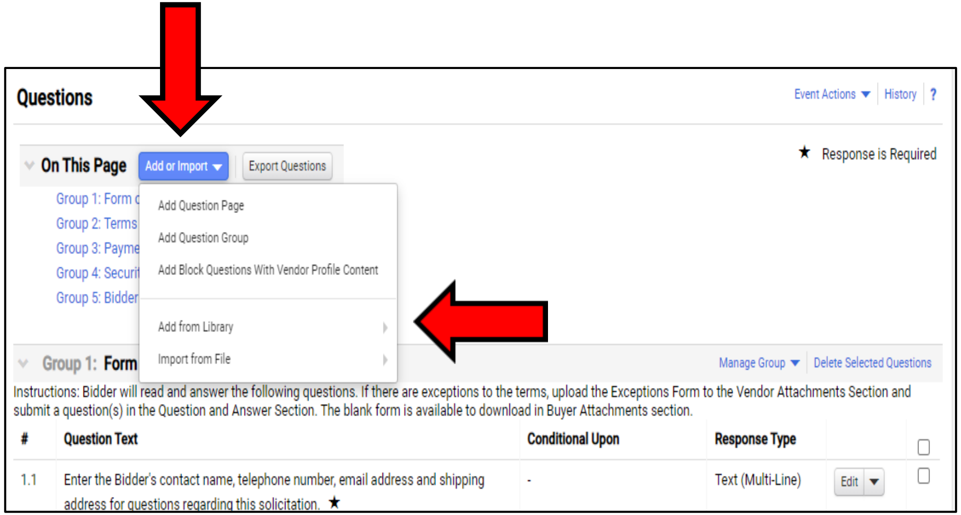
The Buyer may choose to delete the pre-loaded questions if they do not apply.



Questions – Adding Groups from IMPACS Library

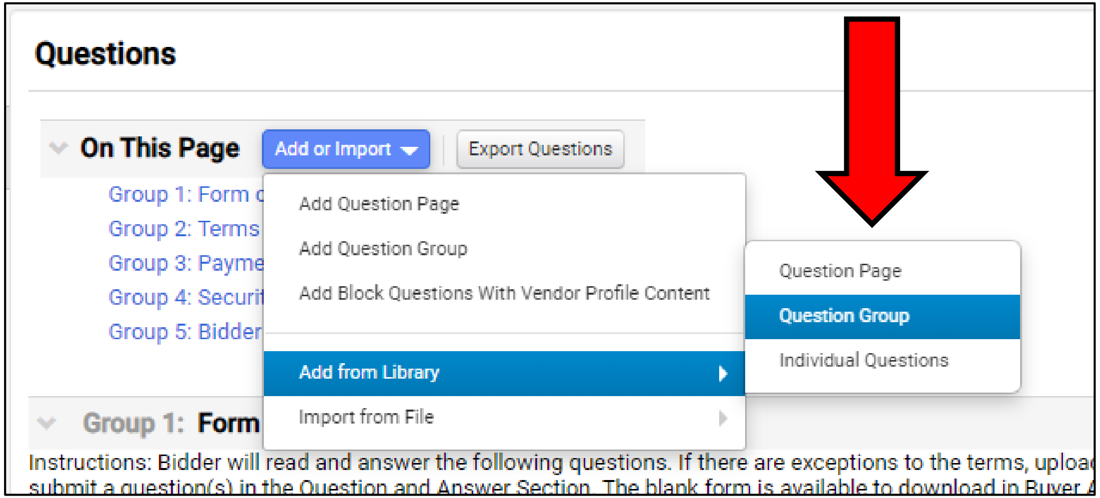
Additional **Question Groups** may be added from the **IMPACS Library** or imported from a file that the Buyer has saved to their computer or another location.

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



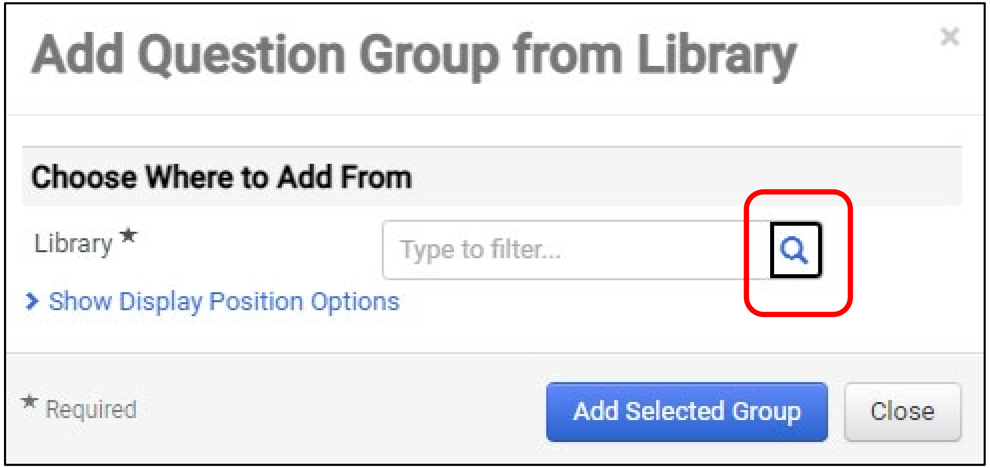
Question Group – Add from Library

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



Question Group – Add Group from Library

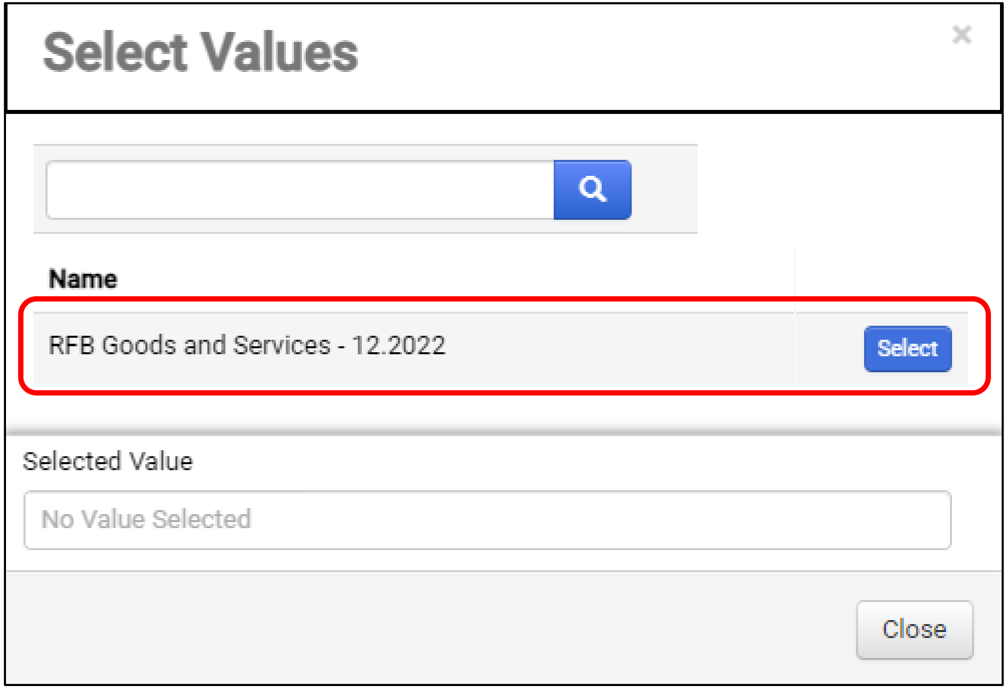
When Adding a Question Group from the Library, click on the **Search icon** to select a Question Group from the Library.



Question Group – Add Group from Library

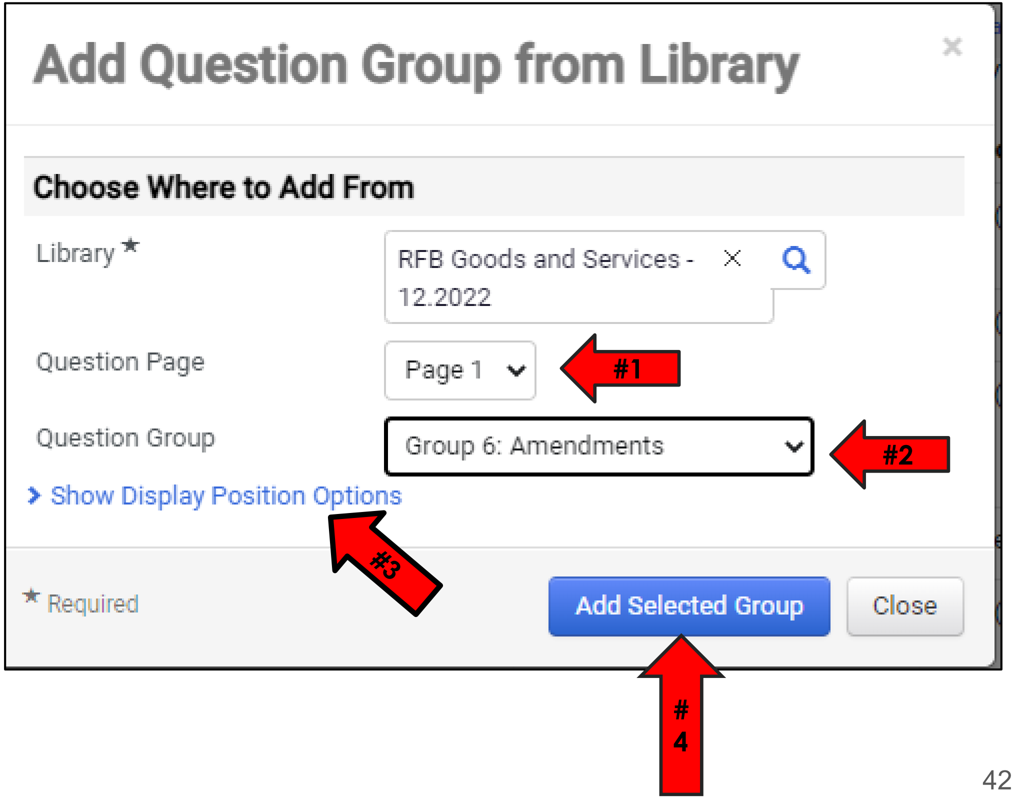
Select the Library that has the Question Group you are looking for.

Click the **Select** button.



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.

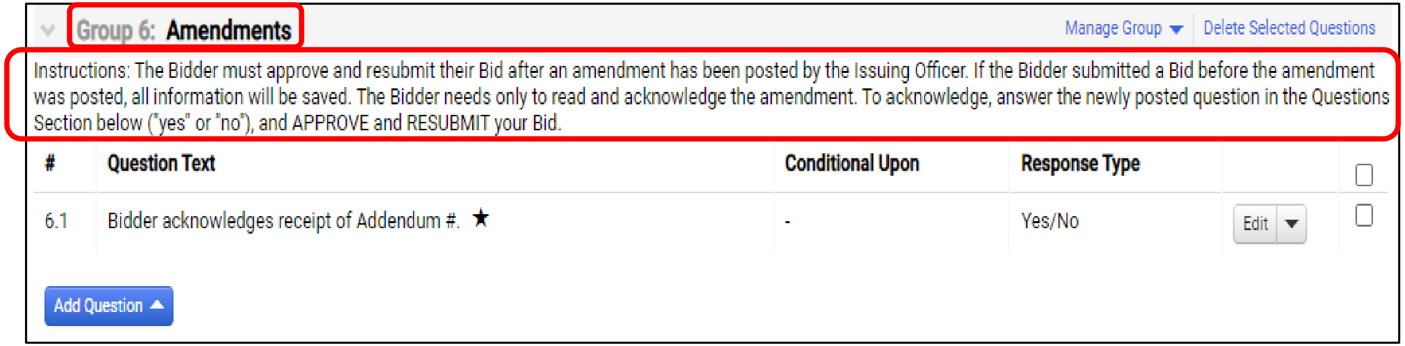


Question Group – Add Group from Library

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.**



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Questions Group

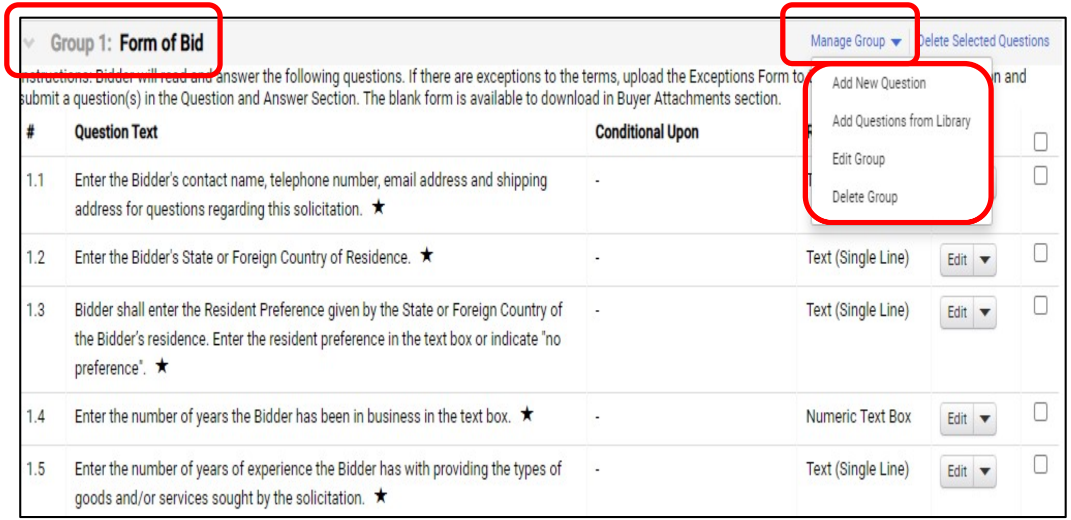
Manage Group

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 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.

Group 2: **Terms and Conditions** 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	
2.1	Bidder shall read the RFB Definitions and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.2	Bidder shall read the Administrative Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.3	Bidder shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.4	Bidder shall read the Specification Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.5	Bidder shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.6	Bidder shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.7	Bidder shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit
2.8	Bidder shall read the Insurance Requirements and enter a response. ★	-	Dropdown List (Pick One)	Edit
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
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
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

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Questions Section

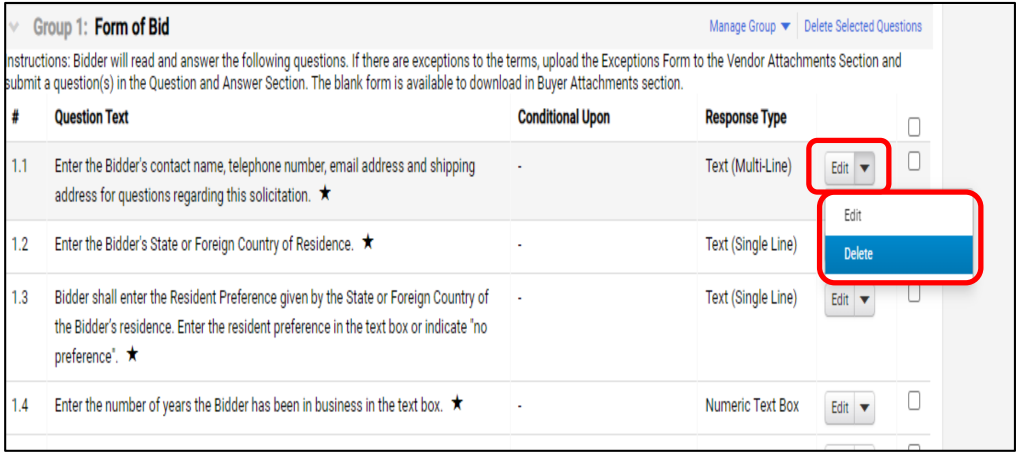
Edit & Delete

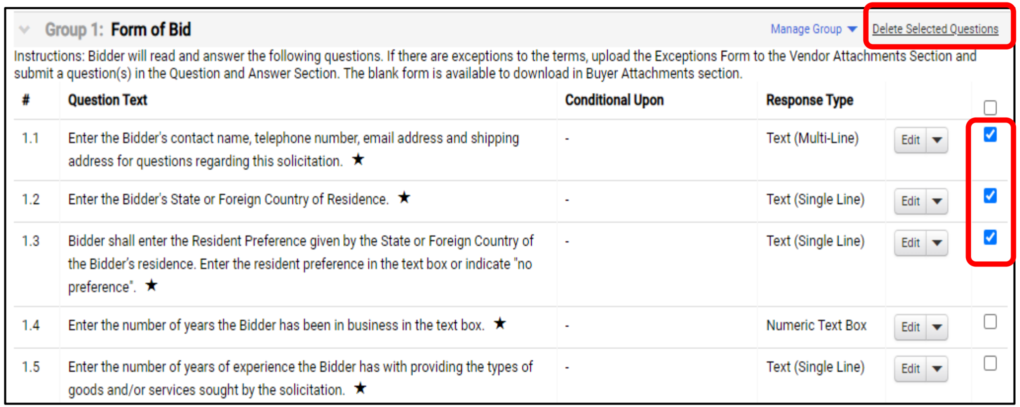
Questions - Edit & Delete

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.





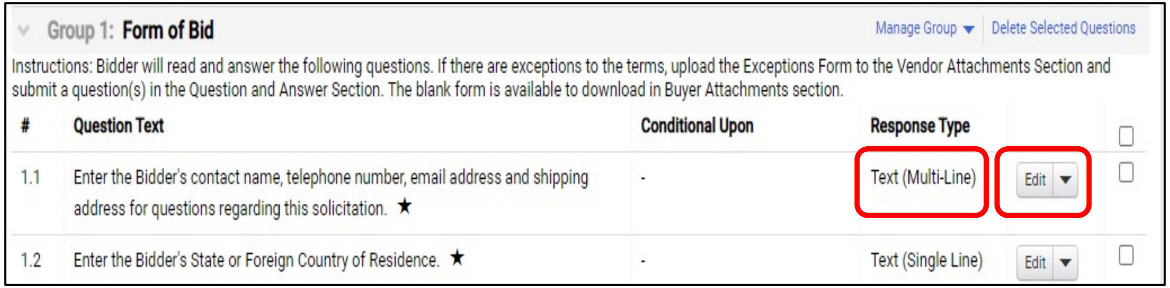
Questions – Response Type

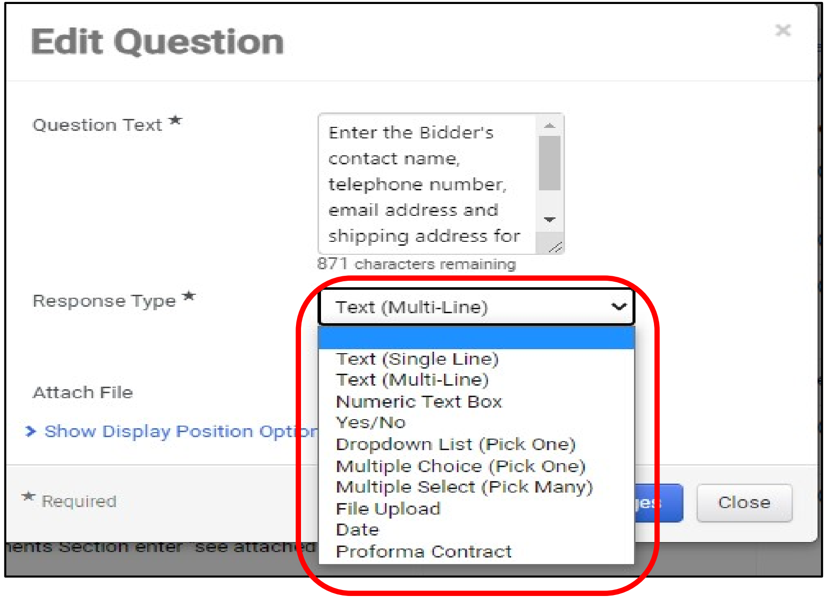
Each Question has a **Response Type.**

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.





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.

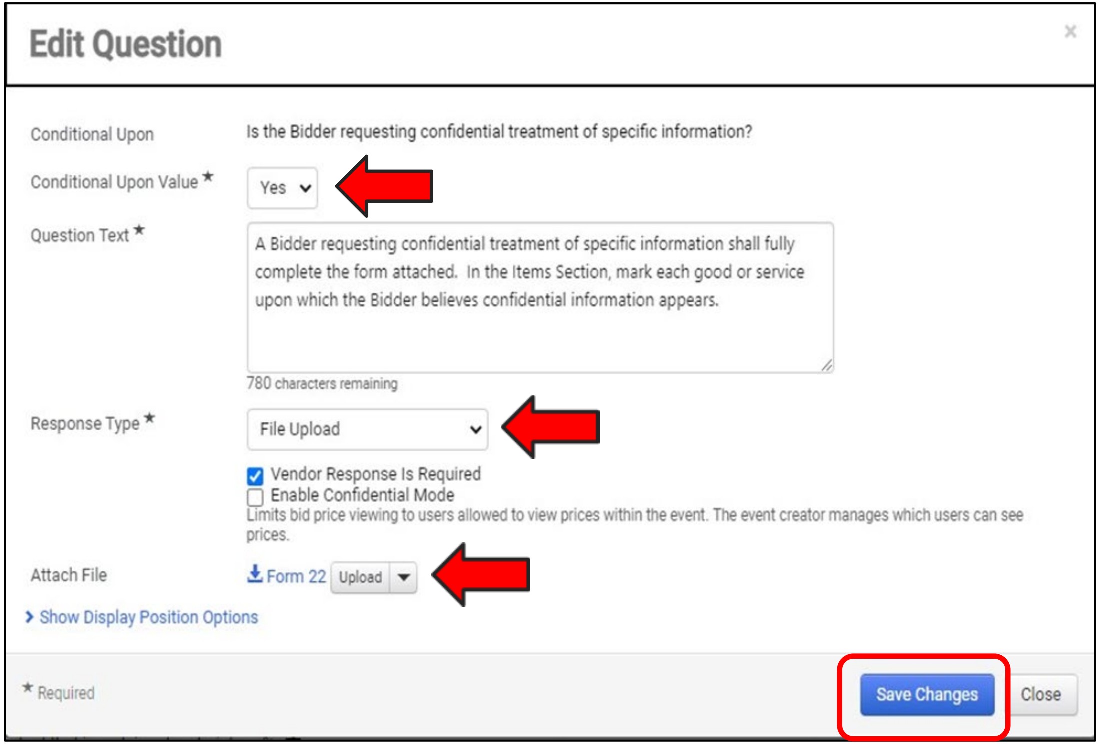
1.12	Is the Bidder requesting confidential treatment of specific information? ★	-	Yes/No	Edit ▾
1.13	A Bidder requesting confidential treatment of specific information shall fully complete the form attached. In the Items Section, mark each good or service upon which the Bidder believes confidential information 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**

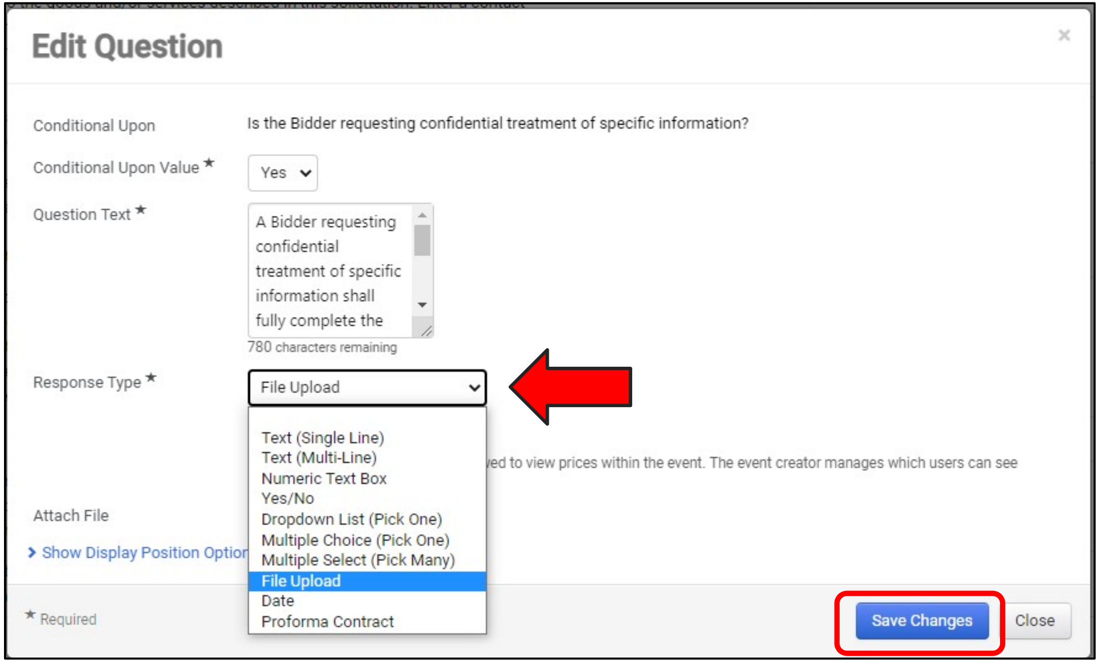
The Buyer may choose from several different **Response Types** from the dropdown box (See next page).



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.



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.

Group 2: **Terms and Conditions** 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		
2.1	Bidder shall read the RFB Definitions and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.2	Bidder shall read the Administrative Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.3	Bidder shall read the Contract Terms & Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.4	Bidder shall read the Specification Terms and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.5	Bidder shall read the Terms and Conditions for GOODS and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.6	Bidder shall read the Terms and Conditions for SERVICES and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.7	Bidder shall read the Federal Terms and Conditions and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
2.8	Bidder shall read the Insurance Requirements and enter a response. ★	-	Dropdown List (Pick One)	Edit	☐
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	☐
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	☐
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	☐

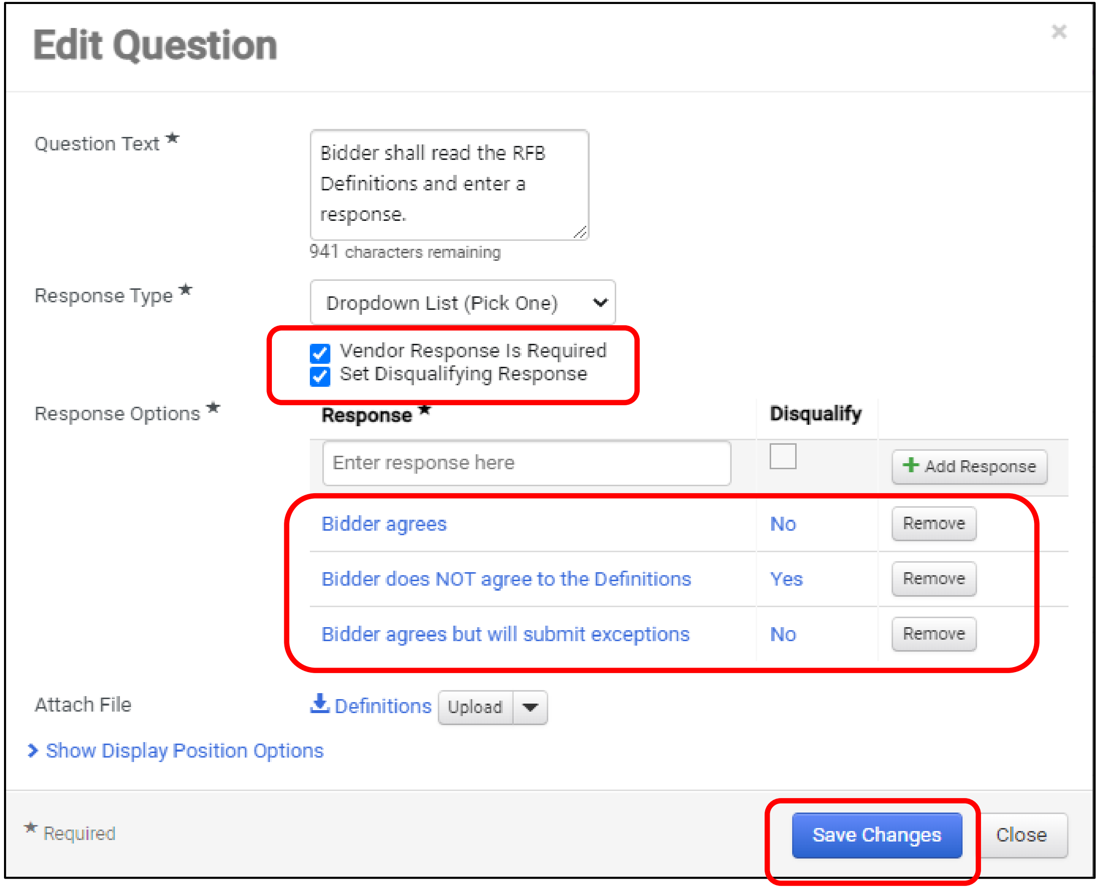
Questions – Dropdown List

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.



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Additional Item Fields

Add Specifications to Bid Items or create your own Item Field (Optional)

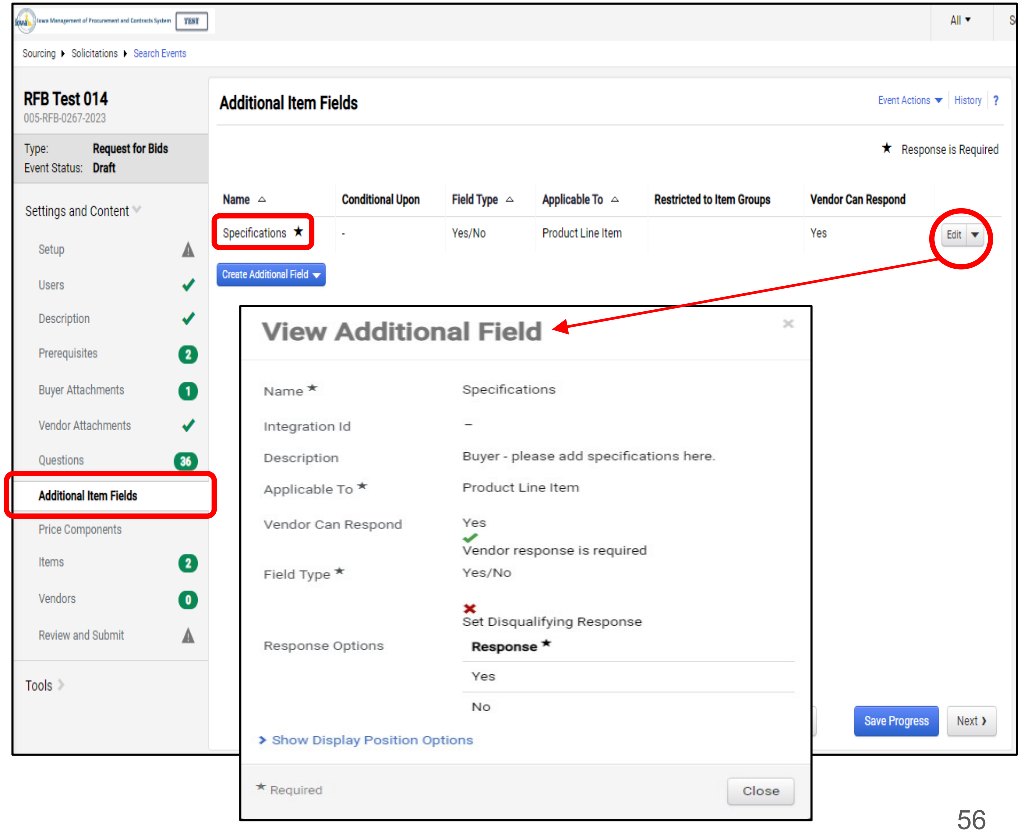
Additional Item Fields

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.



Price Components

Optional

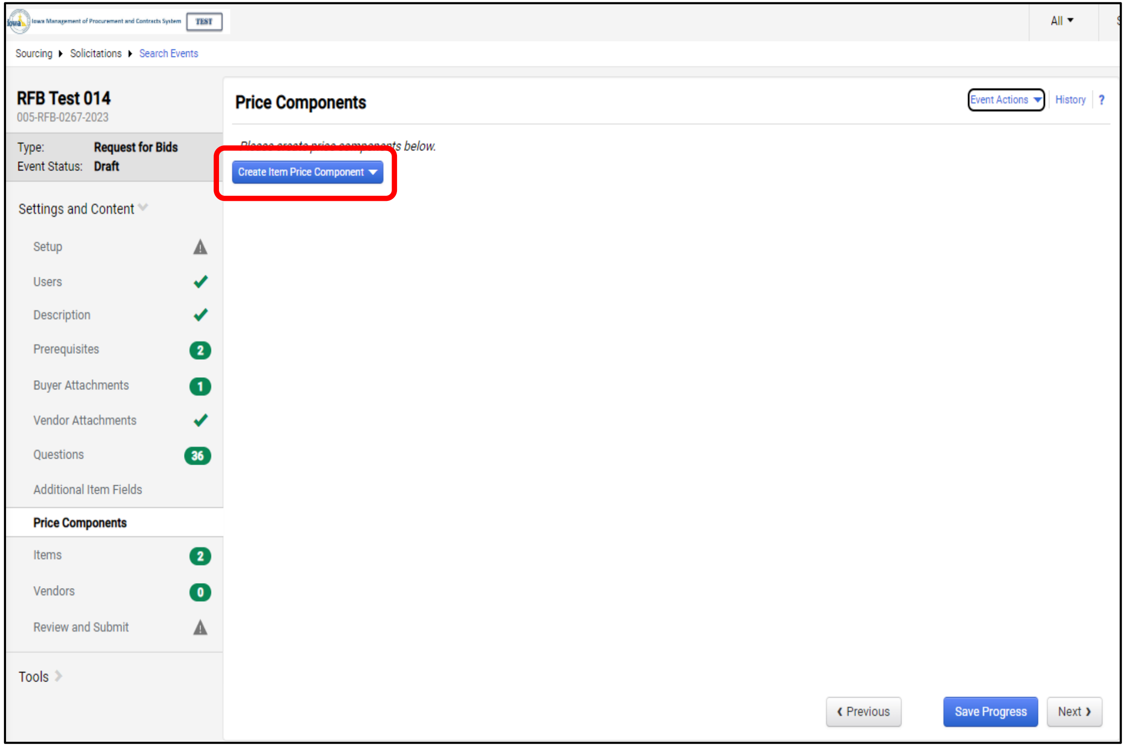
Price Components

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.

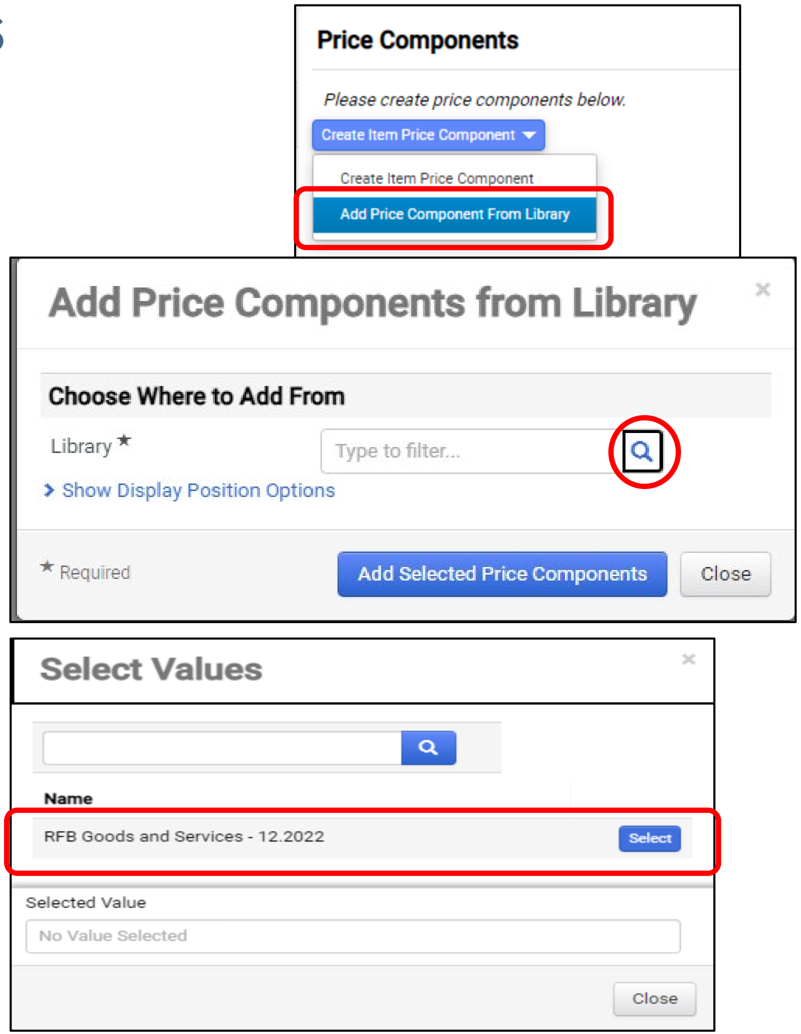


Price Components

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).

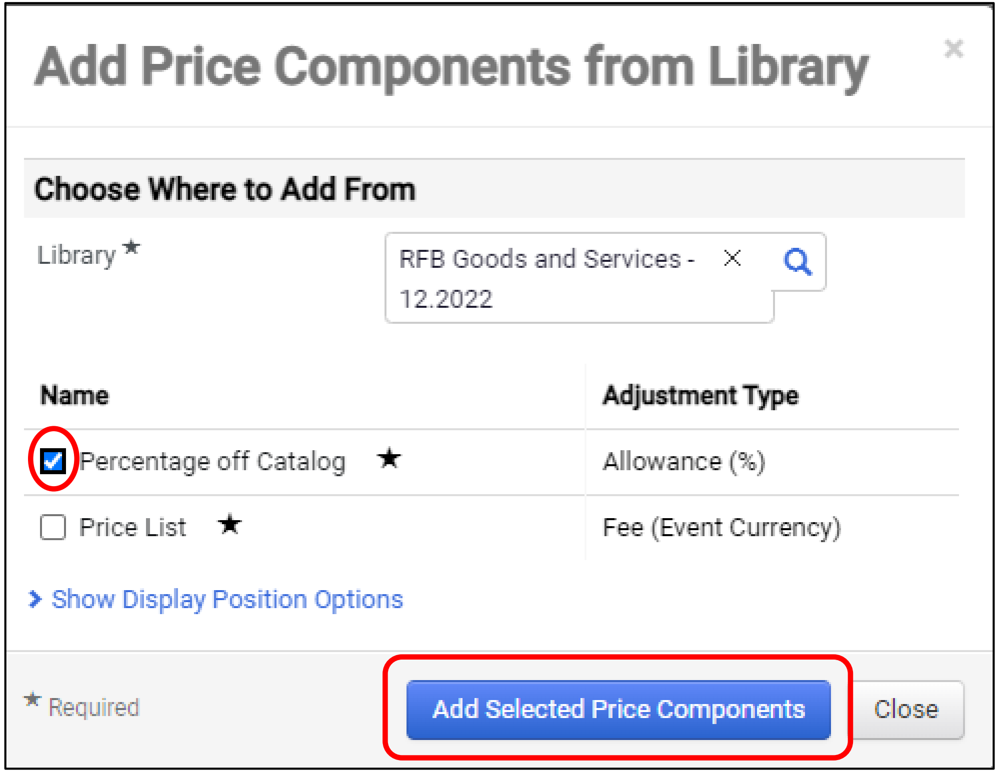
Select RFB Goods and Services.



Add Price Components from Library

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

Select **Add Selected Price Components**.



Edit Item Price Component

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

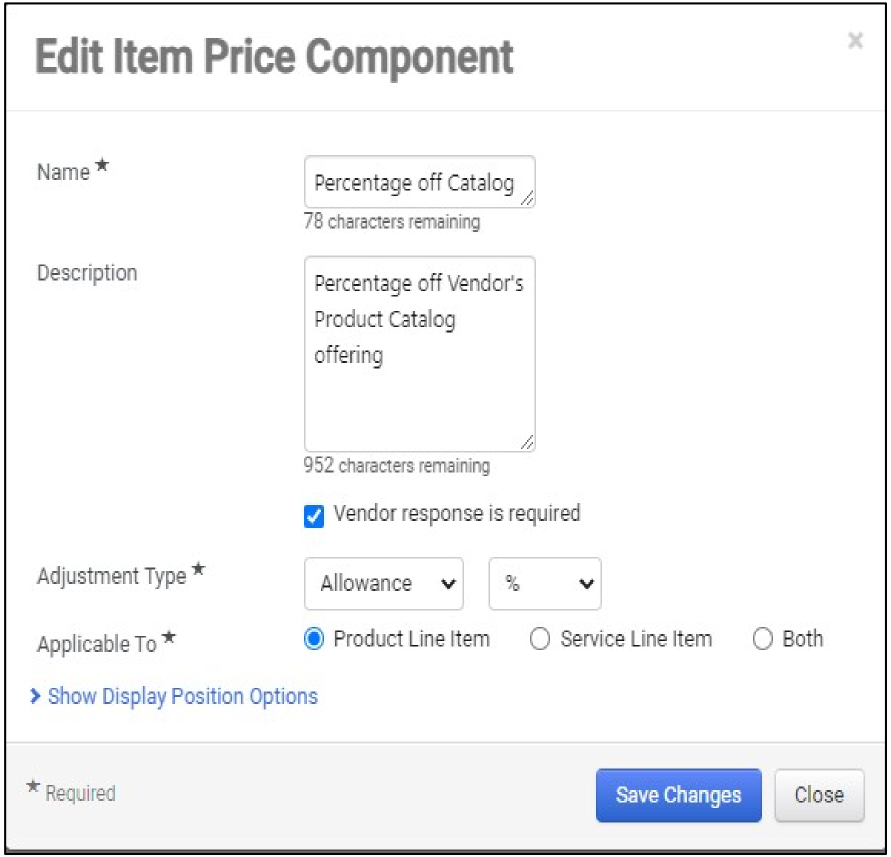
This is where the name of the Price Component may be changed along with the Description and Adjustment Type.

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



Items

Product Line Items and Service Line Items

Product Line Items

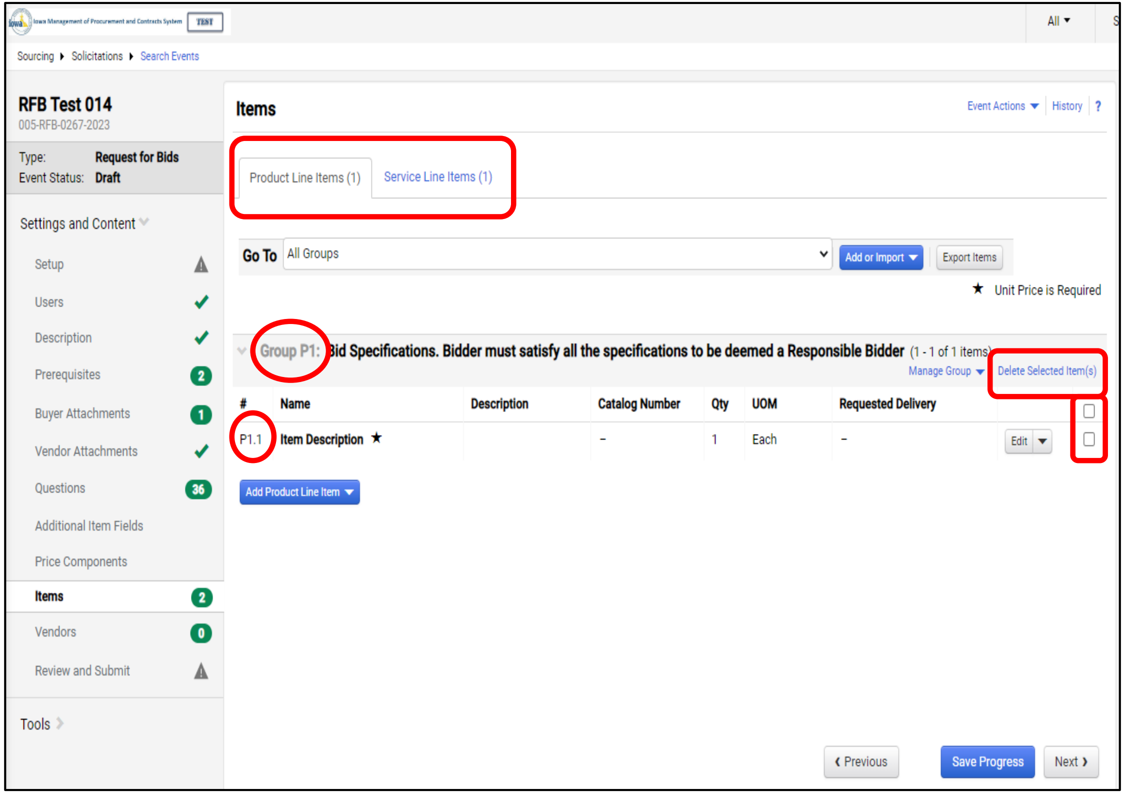
There are two tabs at the top of the Item Page:

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.



Product Line Items

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

The selections are:

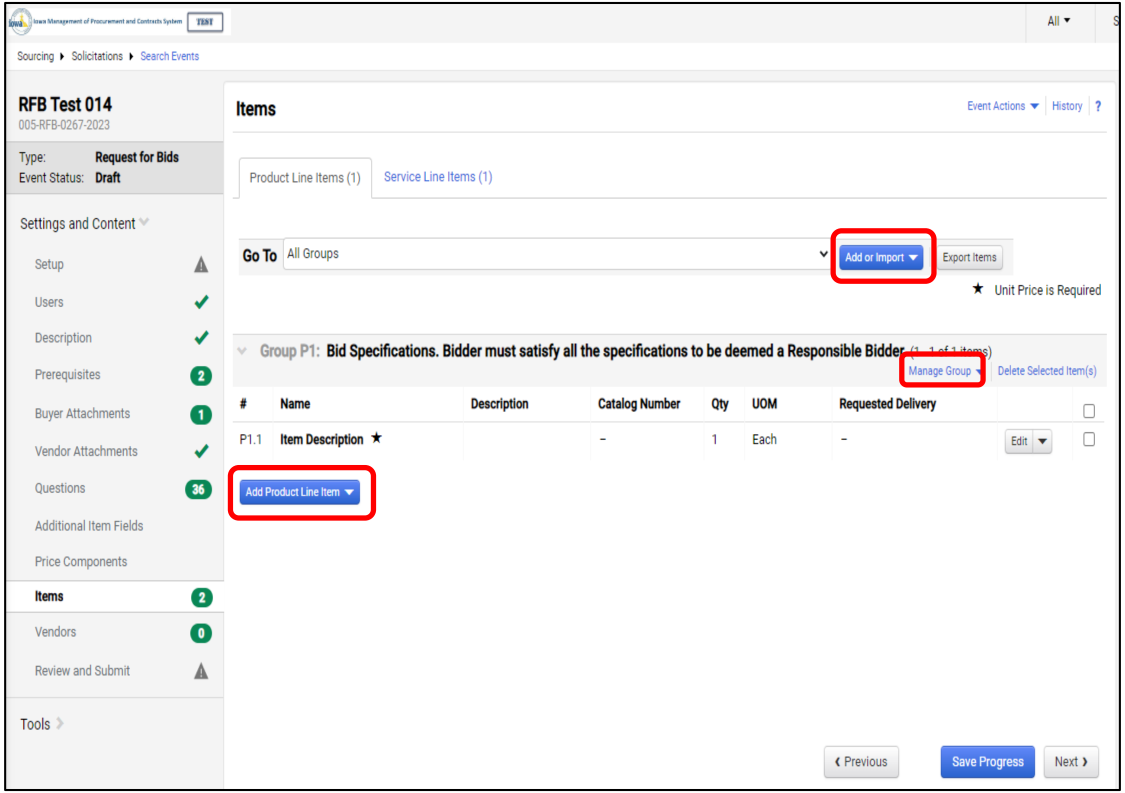
1. Add Item Group
2. Import from Library
3. Import from File (see next page)

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**.

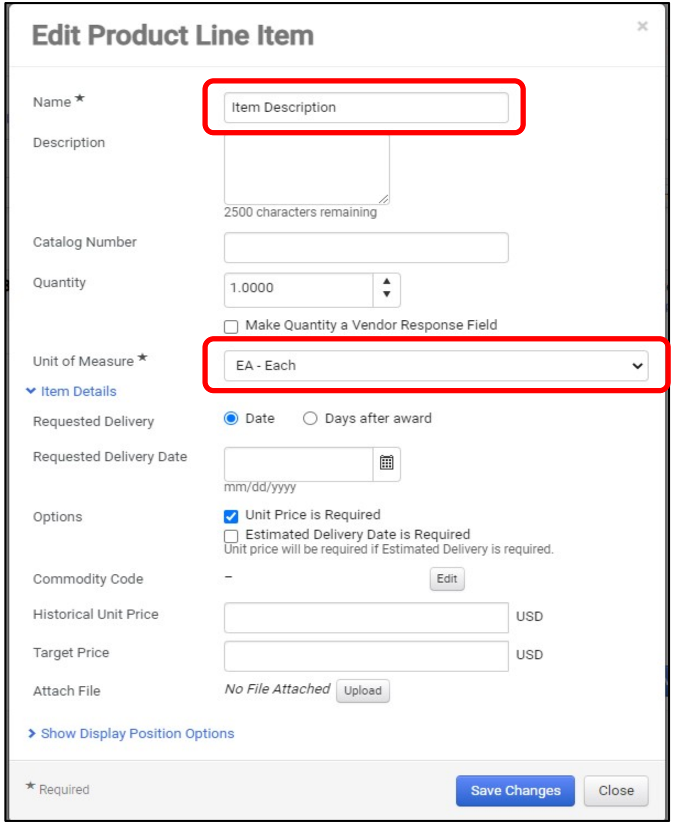


Edit Product Line Item

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

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

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



Edit Product Line Item

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

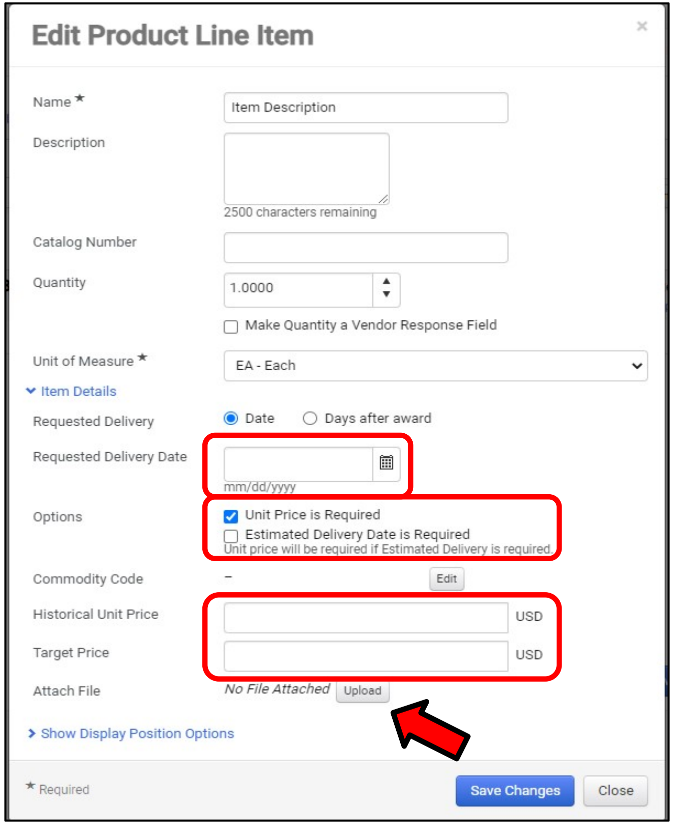
The Buyer may make **Unit Price** and **Delivery Date** Required.

Add Commodity Code

Historical Unit Price and Target Price 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**.



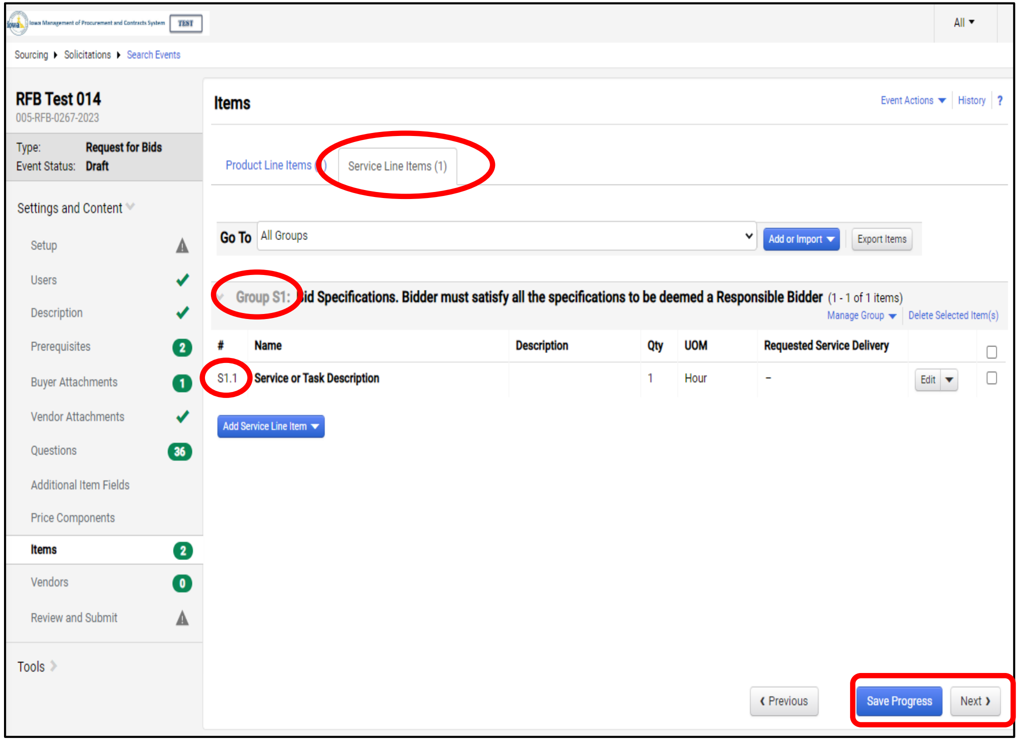
Service Line Item

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**.



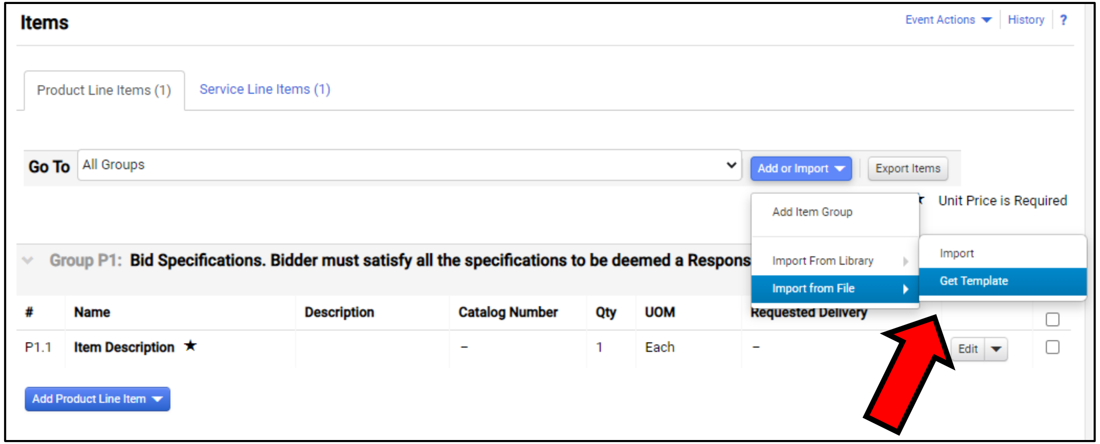
Import from File (Optional)

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

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

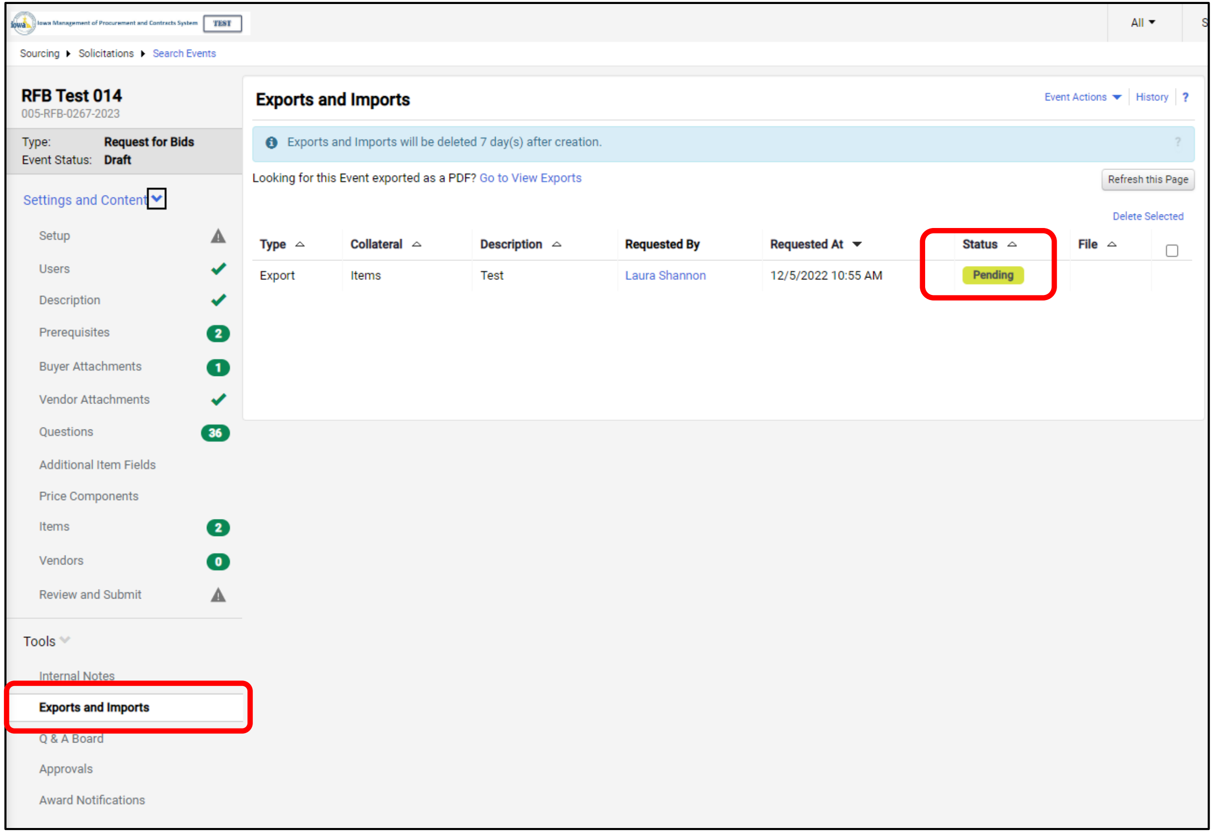
IMAPCS will only import from data entered into the provided template.

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**.



Exports and Imports

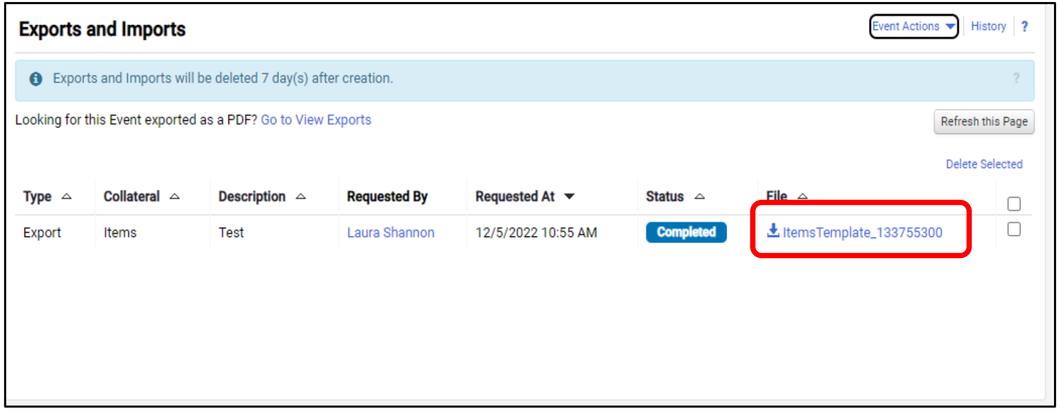
IMPACS will submit the request for the template into the queue. The status of the export can be seen by navigating to the **Tools Section** in the left menu and clicking on **Exports and Imports**.

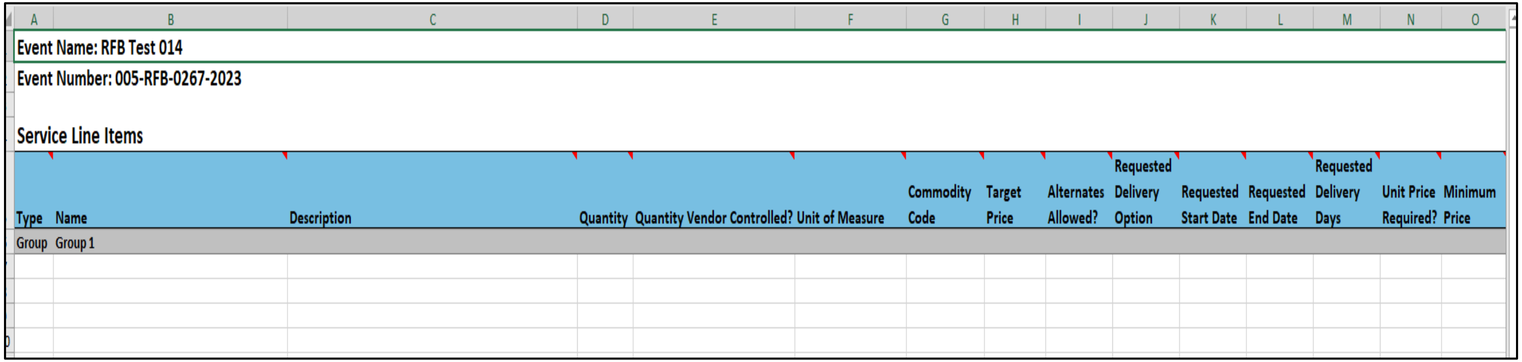


Exports and Imports

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.



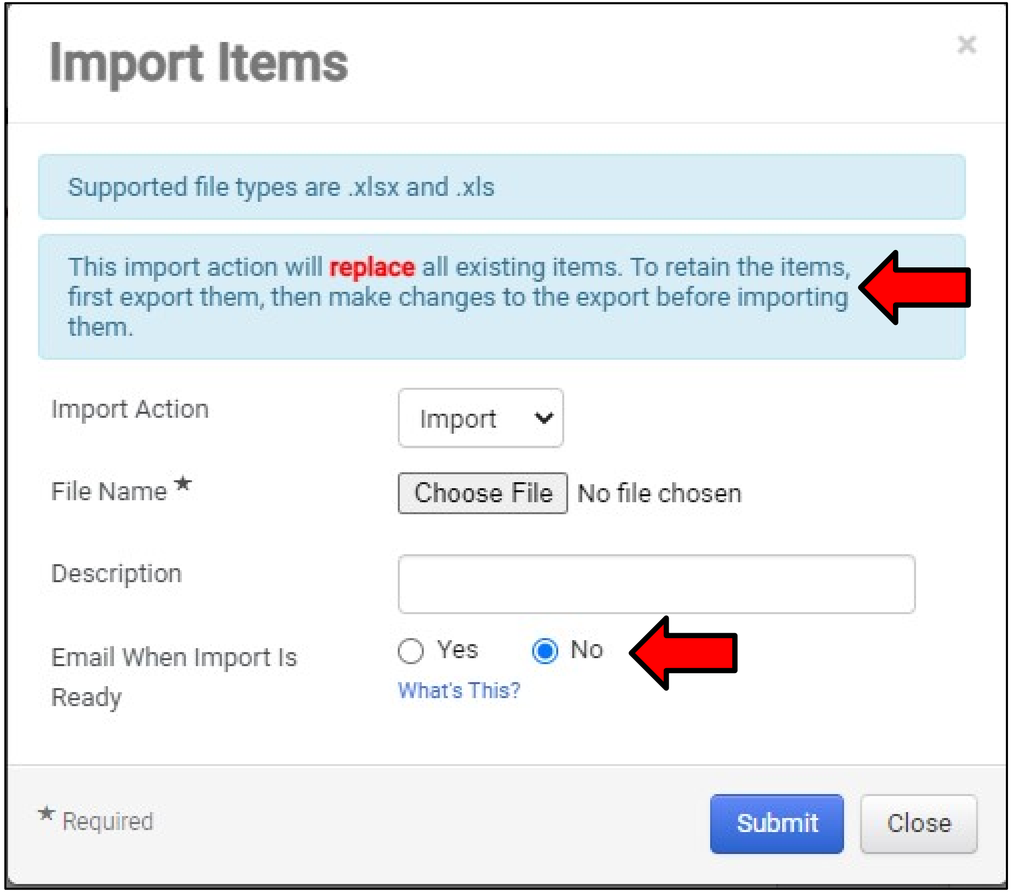


Import Items

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

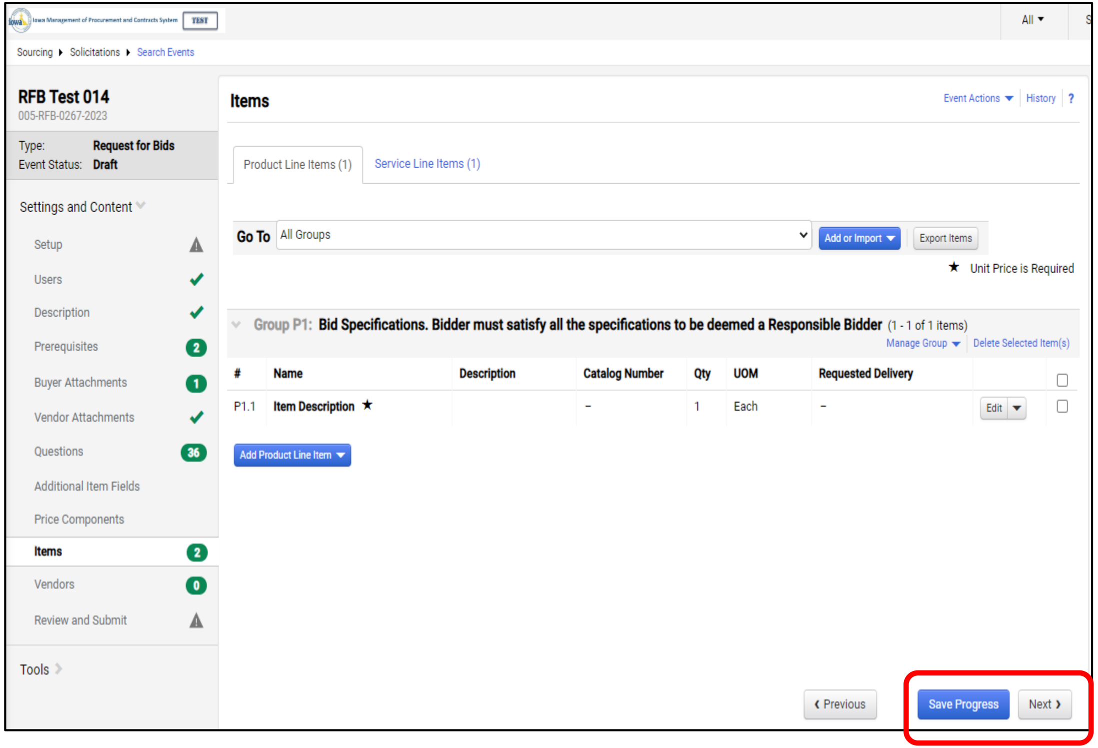
The upload may take a few minutes, so you may choose to be notified by email when the import is finished.

Click **Submit**



Product Line Items

After entering all Line Items, **Save Progress or Next**.



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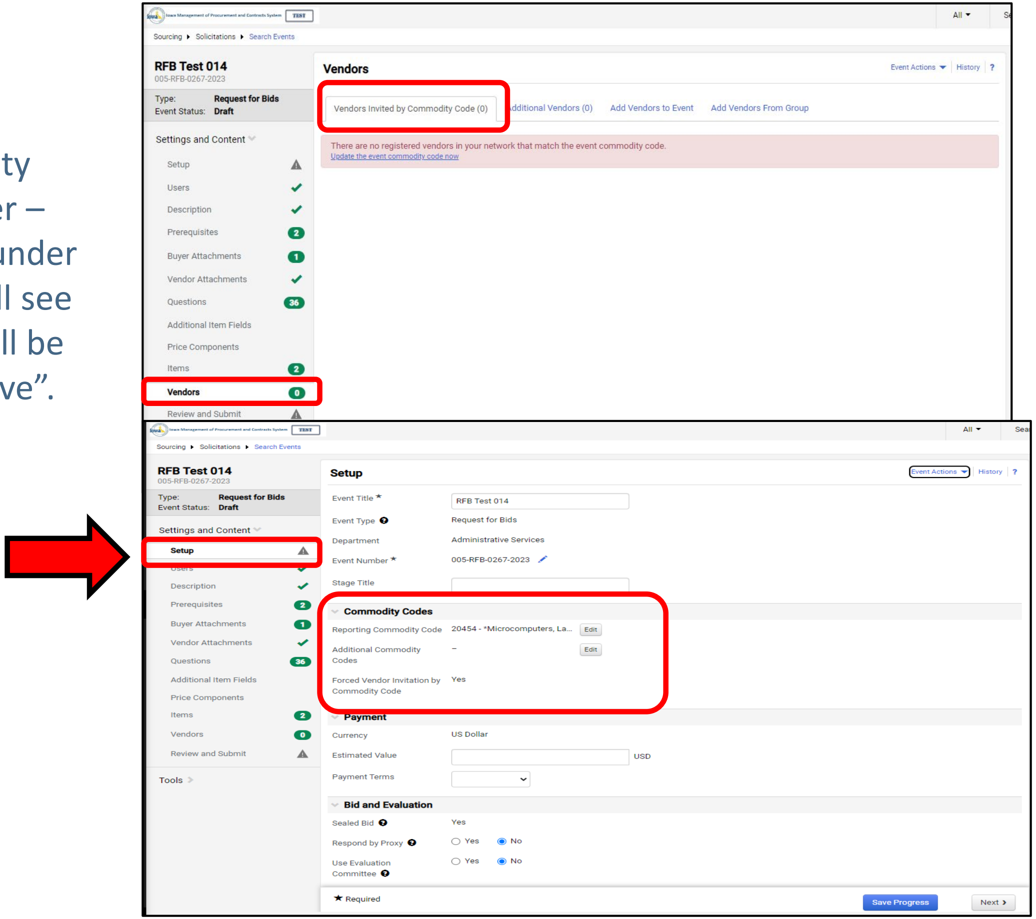
Vendors

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”.

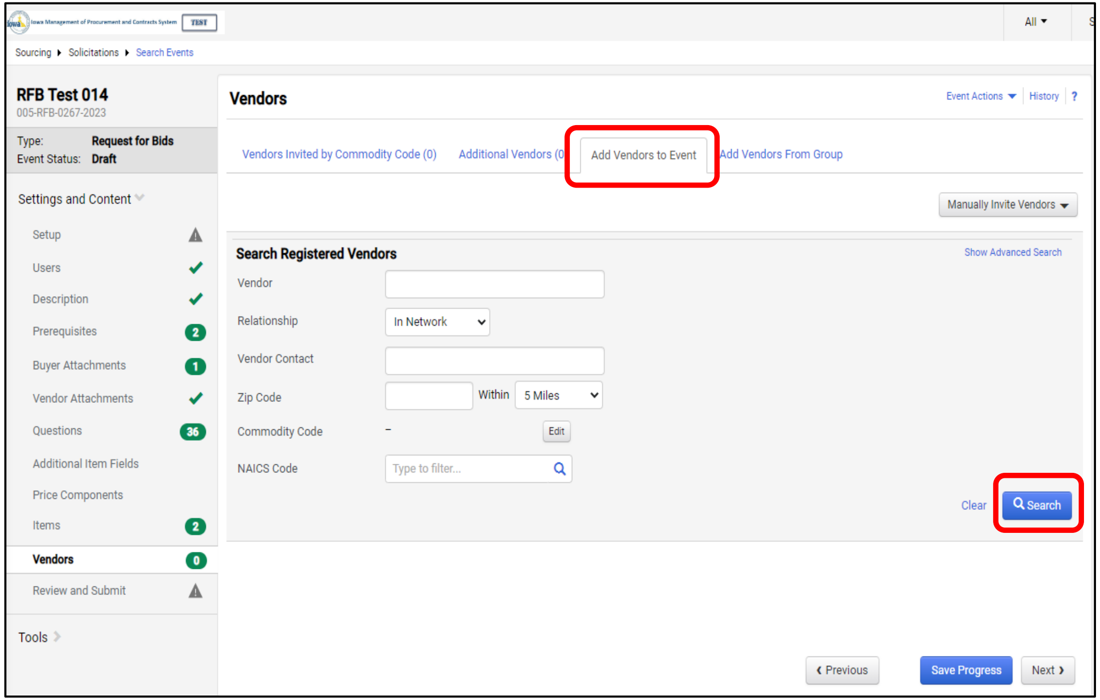


Add Vendors to Event

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**.



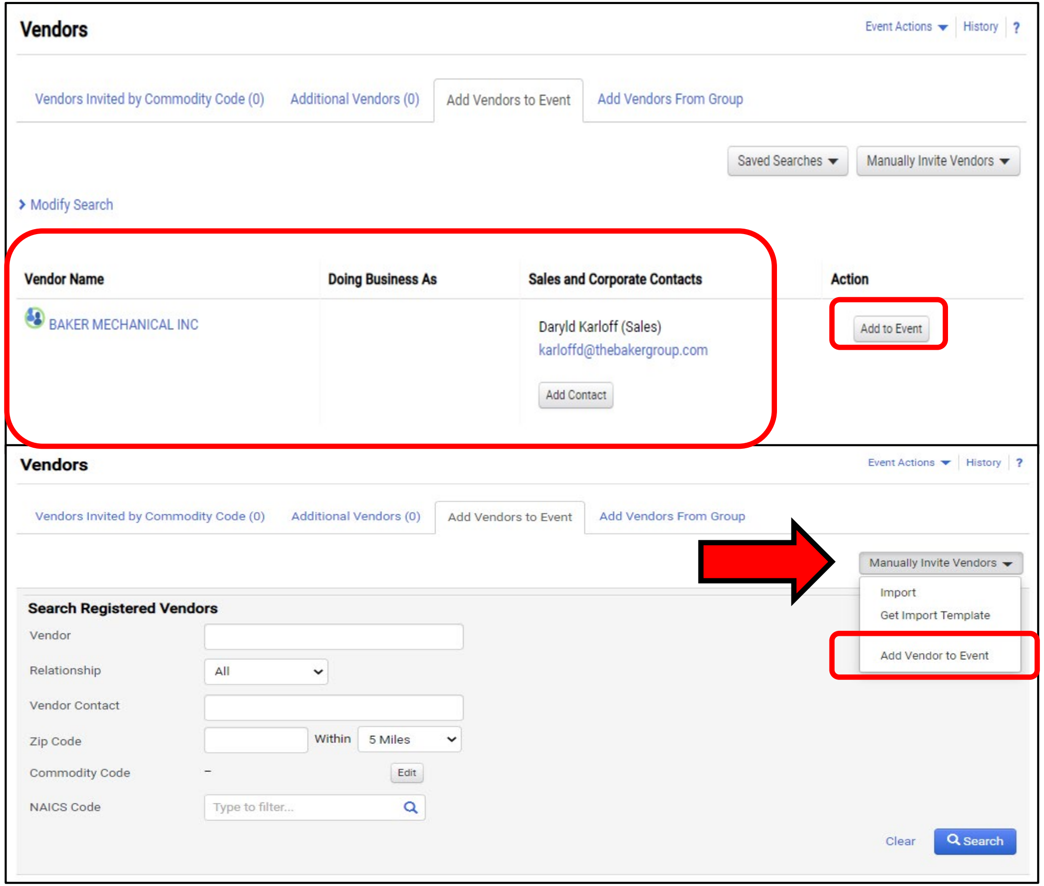
Add Vendors to the Event & Manually Invite Vendors

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.

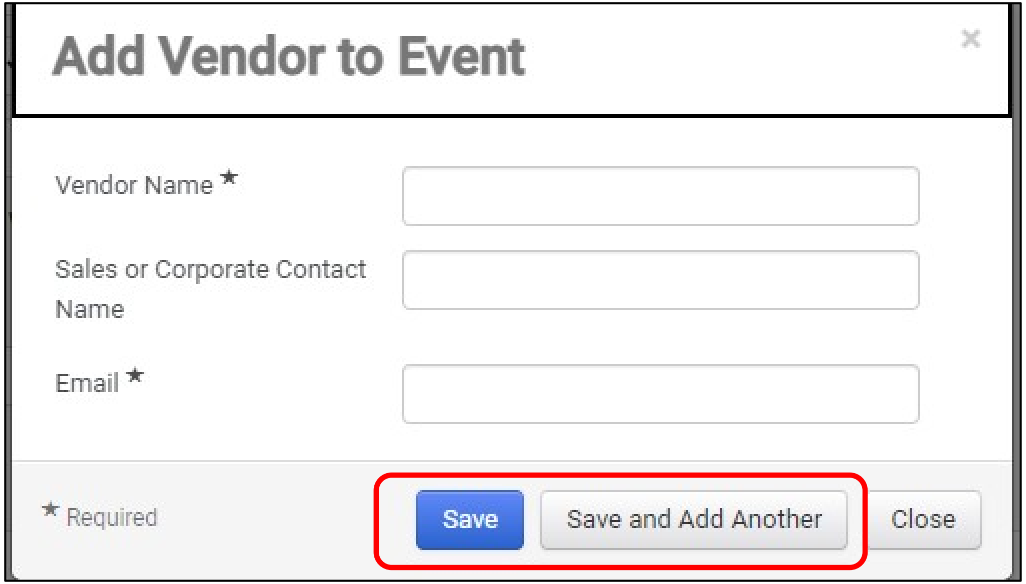
Select **Add Vendor to Event**



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.



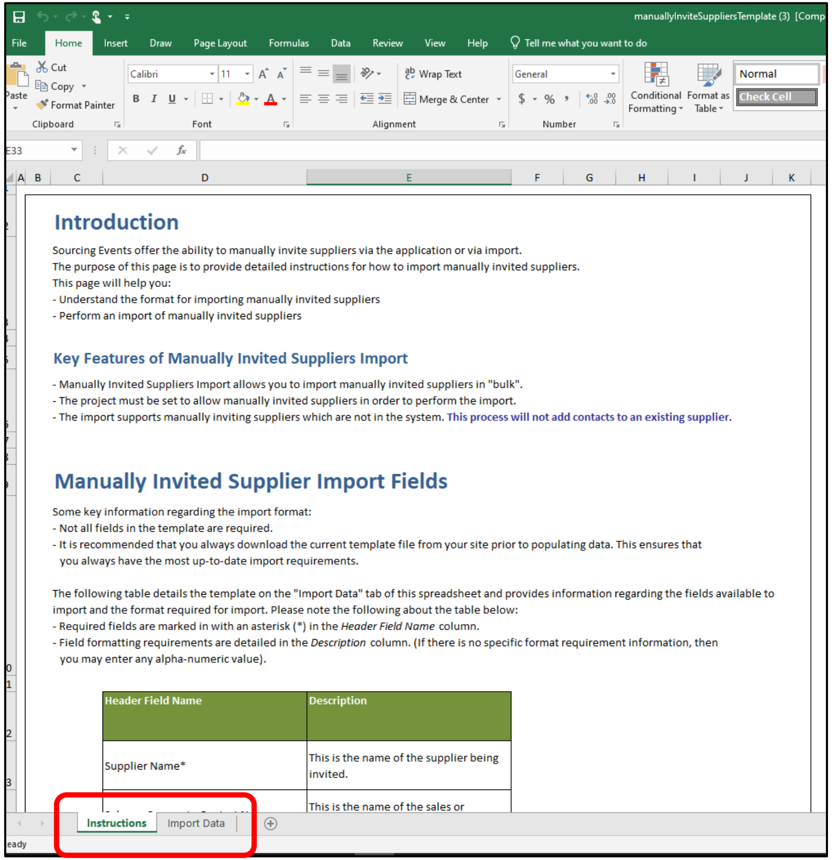
Manually Import Vendors

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.

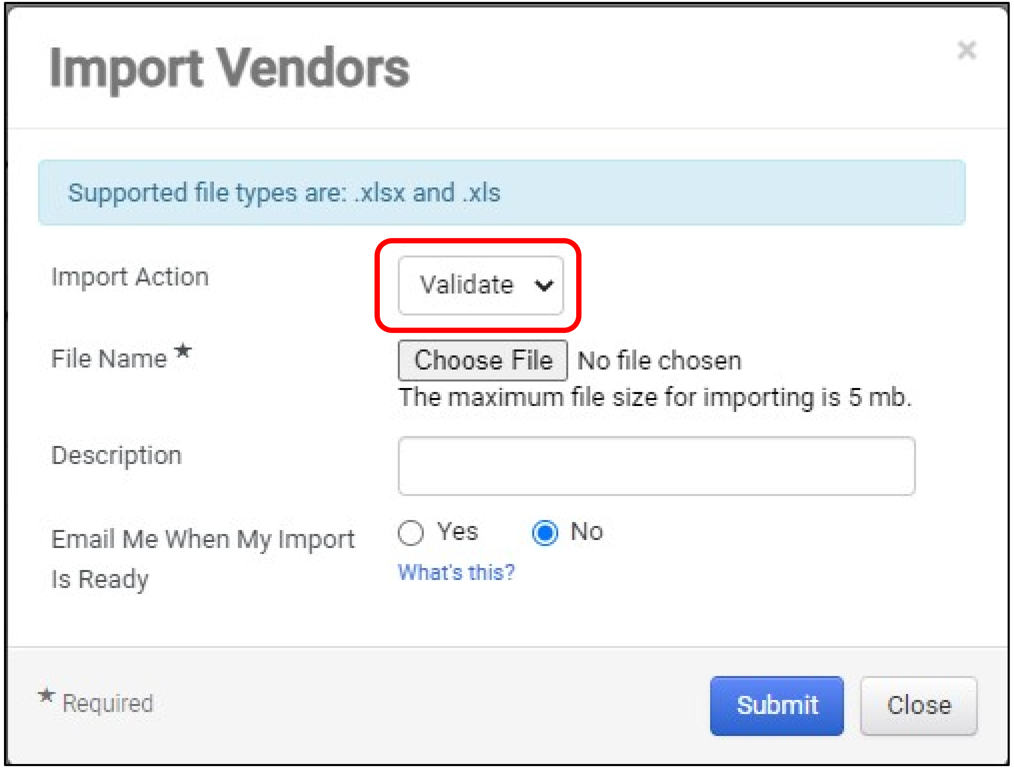


Import Vendors

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

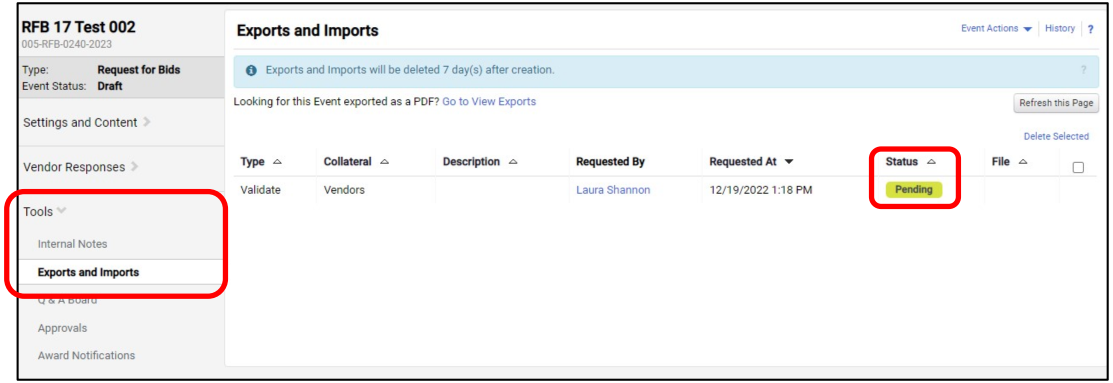
For **Import Action**, Select **Validate.**

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

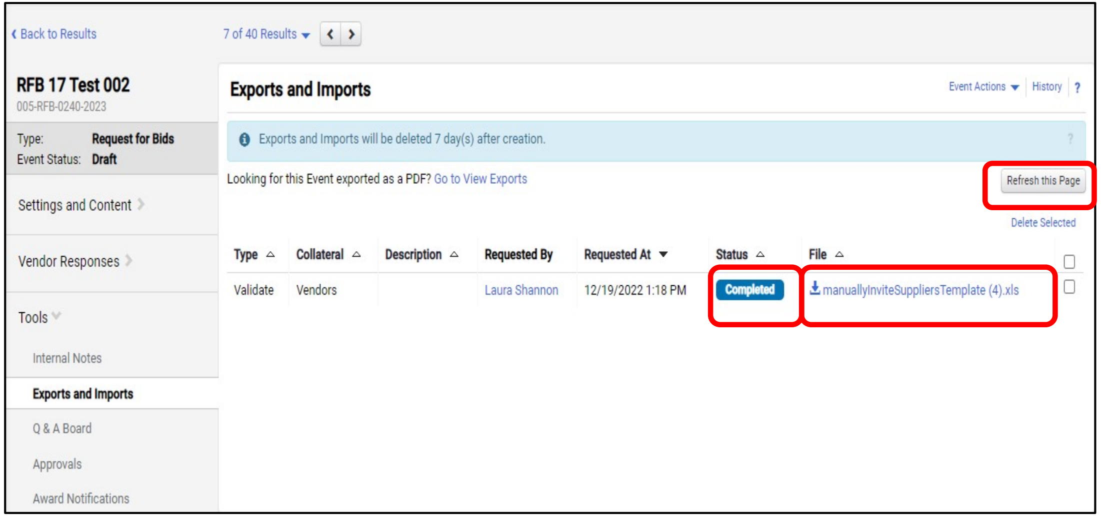


Validation of Vendor File

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



Refresh the page often.



Download the validated file and save it to your computer.

Import Vendor File

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

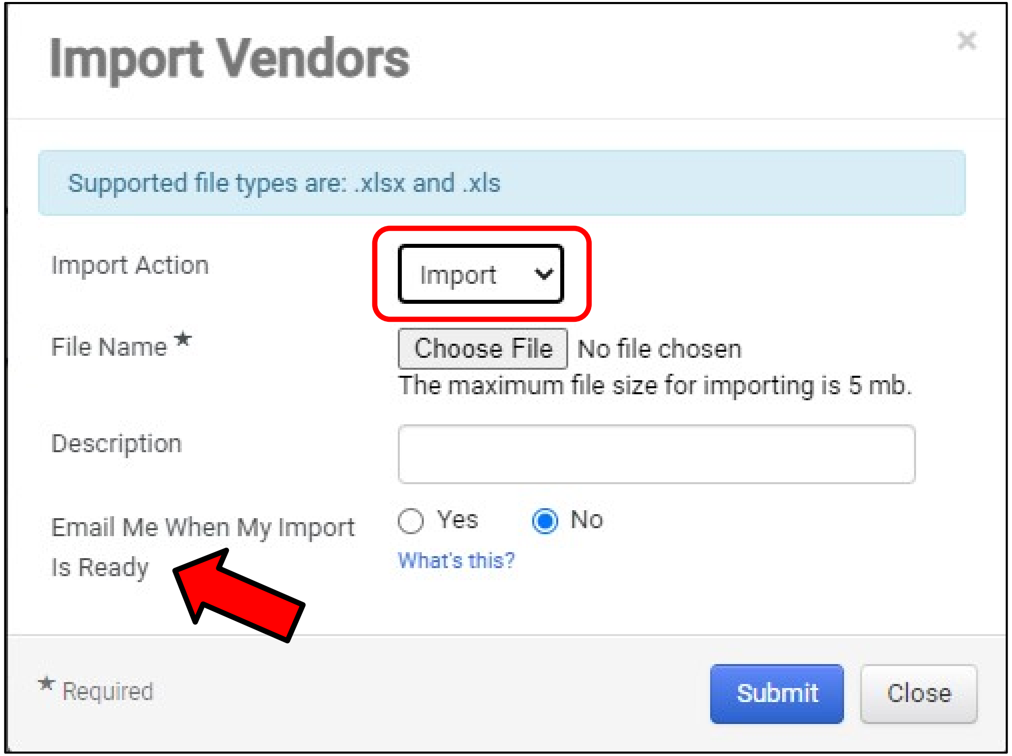
For **Import Action**, Select **Import.**

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.**

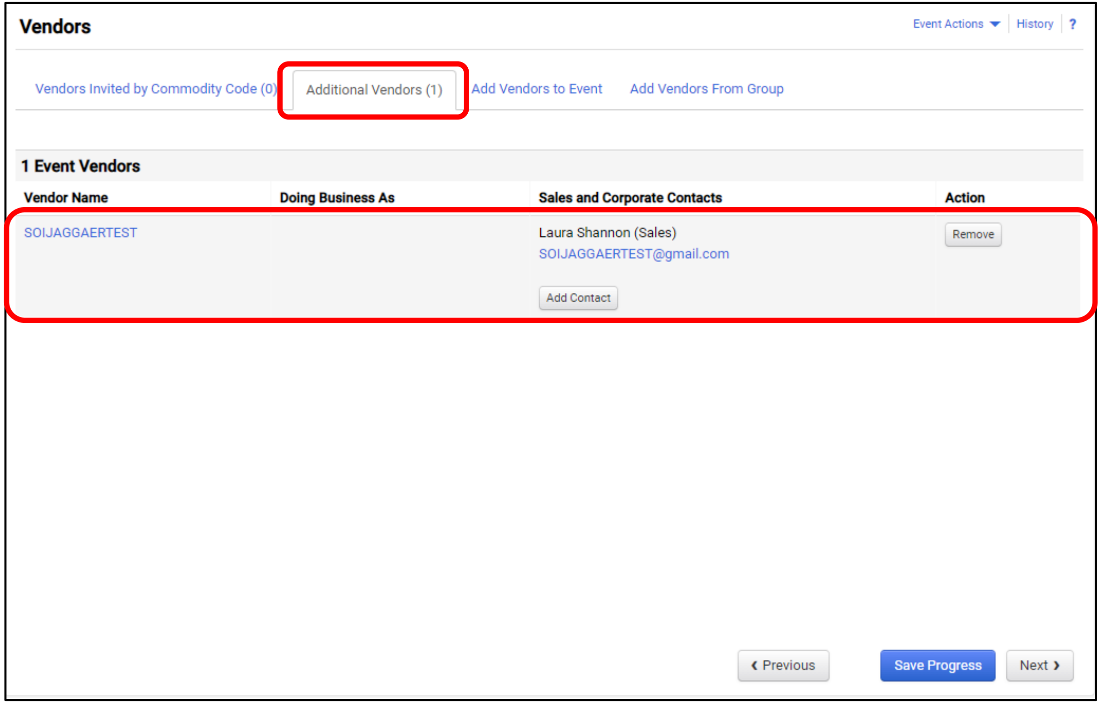


Additional Vendors

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**.



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Review and Submit

Errors and Approval

Review and Submit

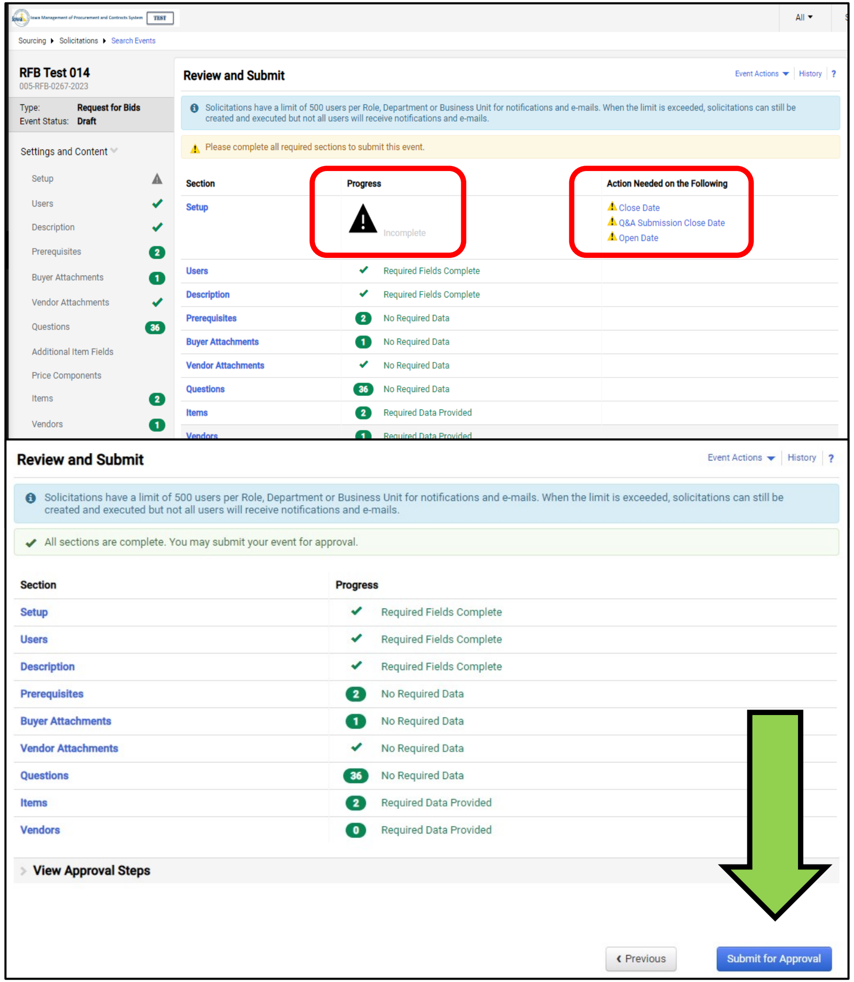
The last step is to **Review and Submit**.

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.



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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

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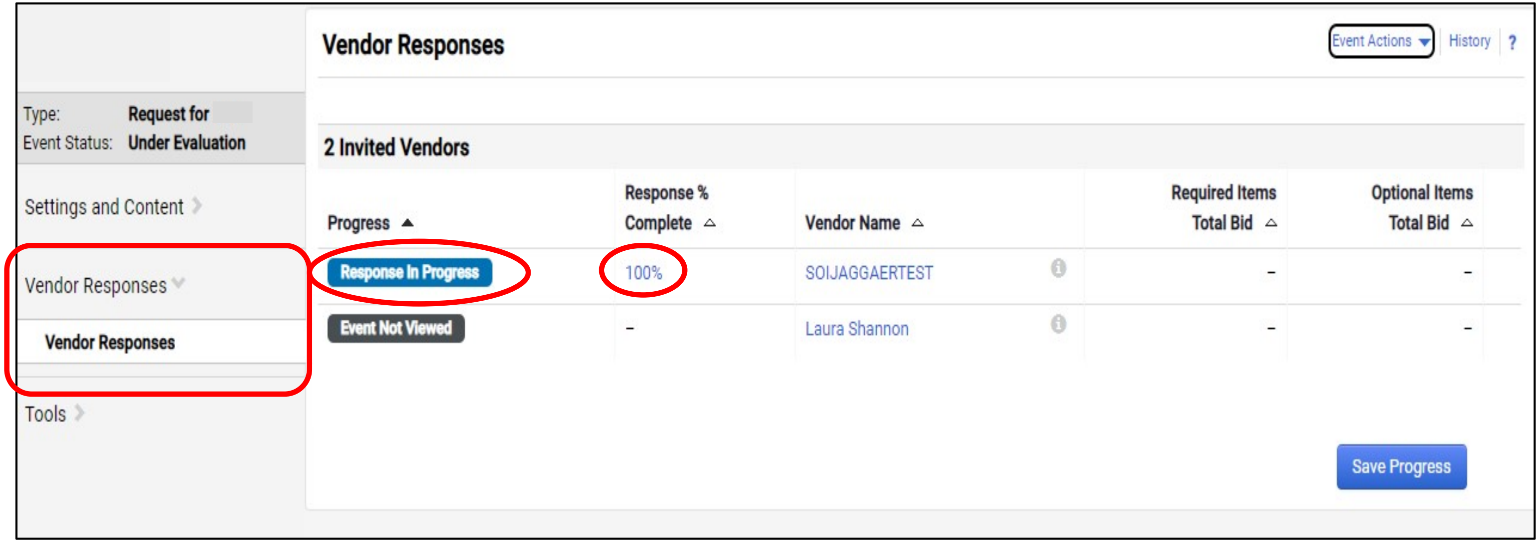
Vendor Responses

Before RFB Close

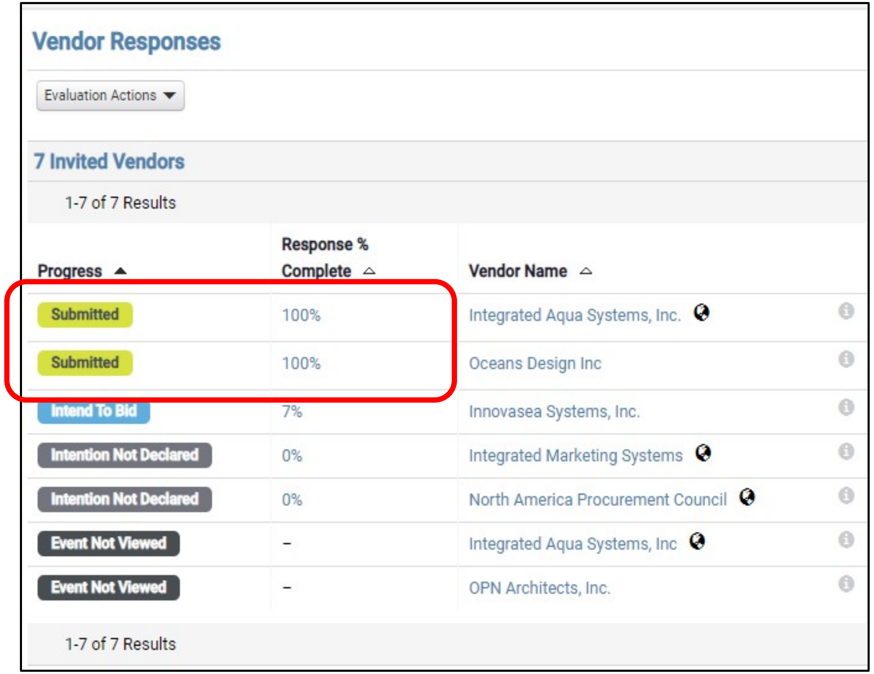
Vendor Responses

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**.



Vendor Responses

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



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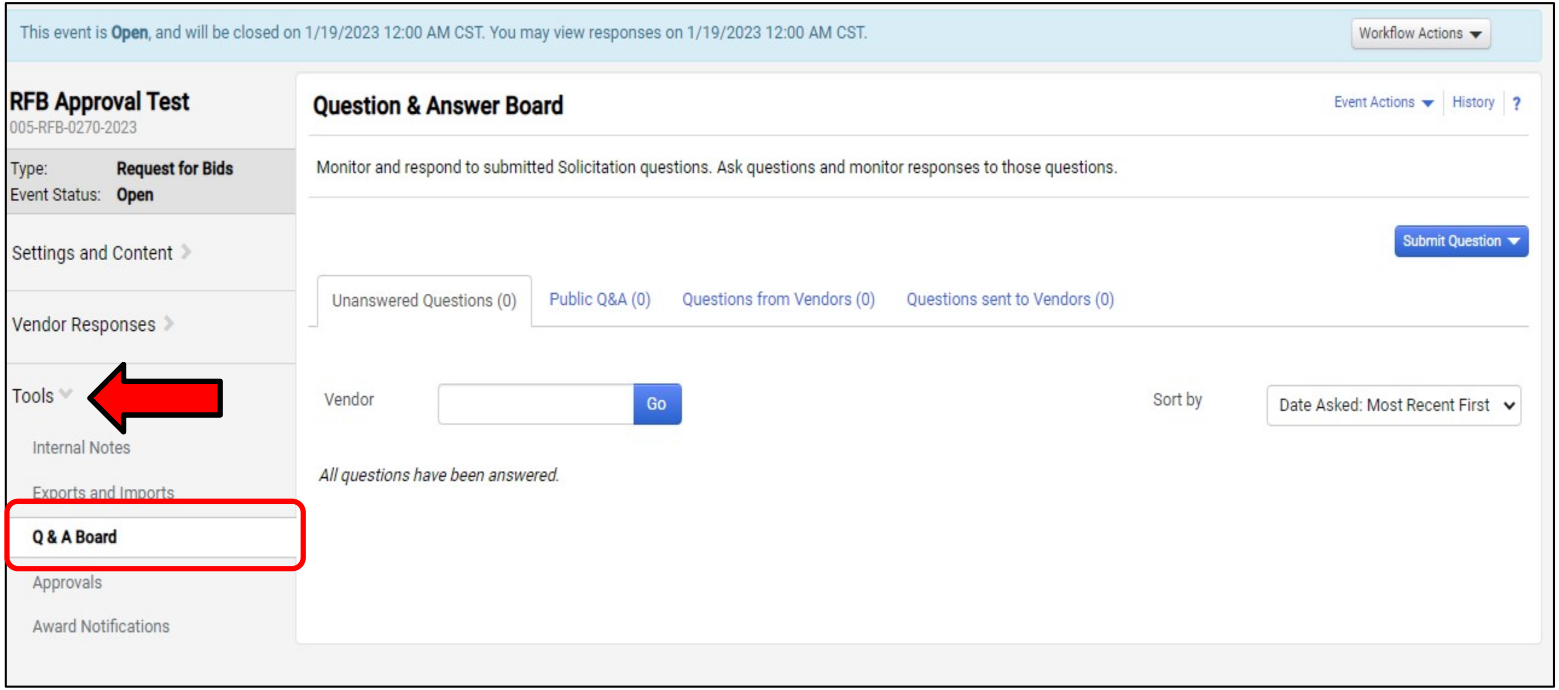
Tools

Questions and Answers Board

Question & Answer Board

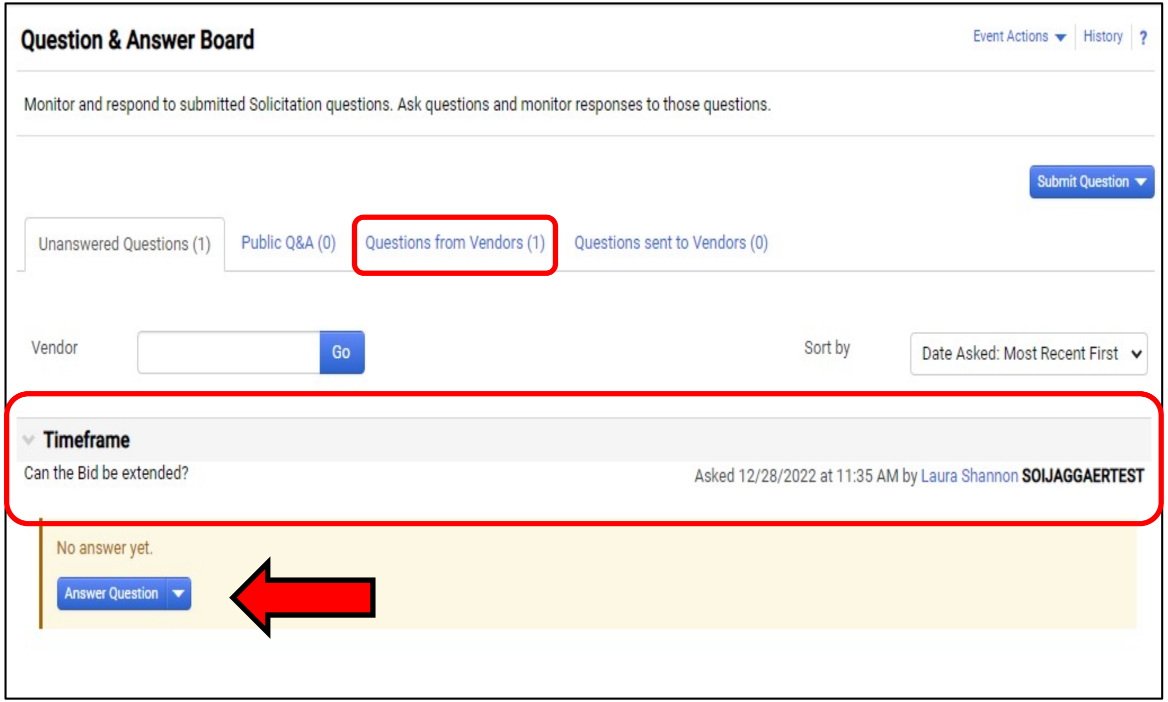
Once the RFQ is open, the Bidders may have questions. When the Bidder posts a question(s) to IMPACS, the Buyer will be notified by email and will be able to navigate to the Tools menu tab and select Q&A Board.



Question & Answer Board

The question will appear on the Q&A Board.

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

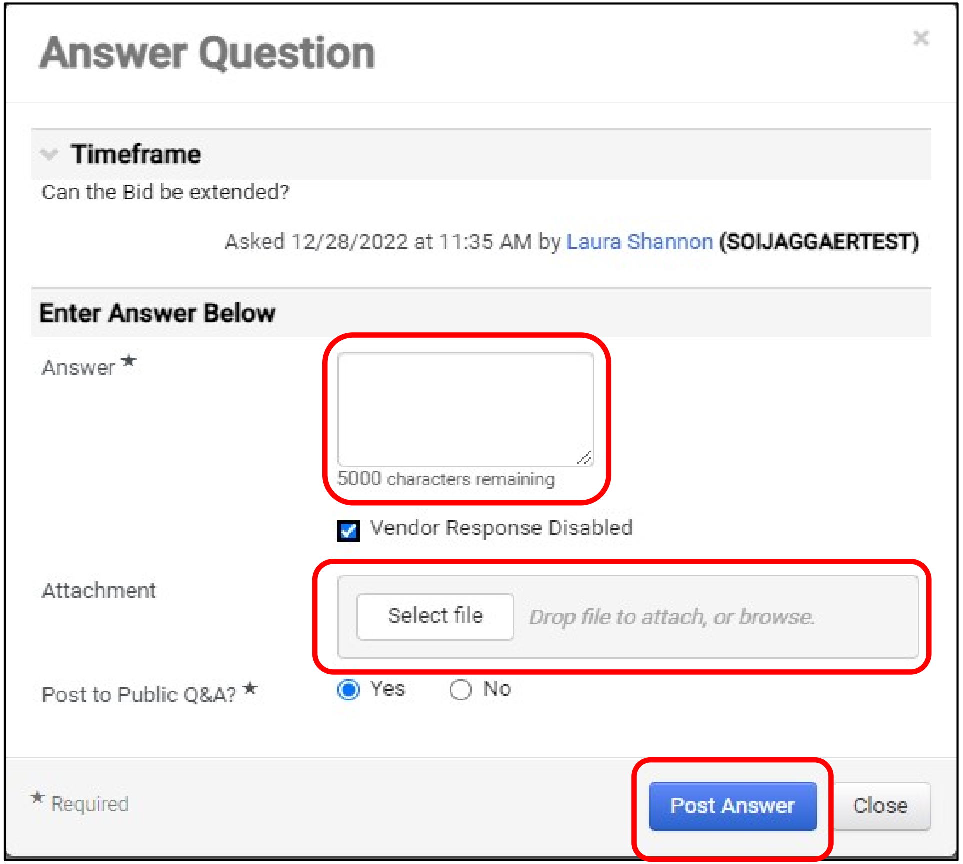


Question & Answer Board – Answer Question

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

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

When done select **Post Answer**.



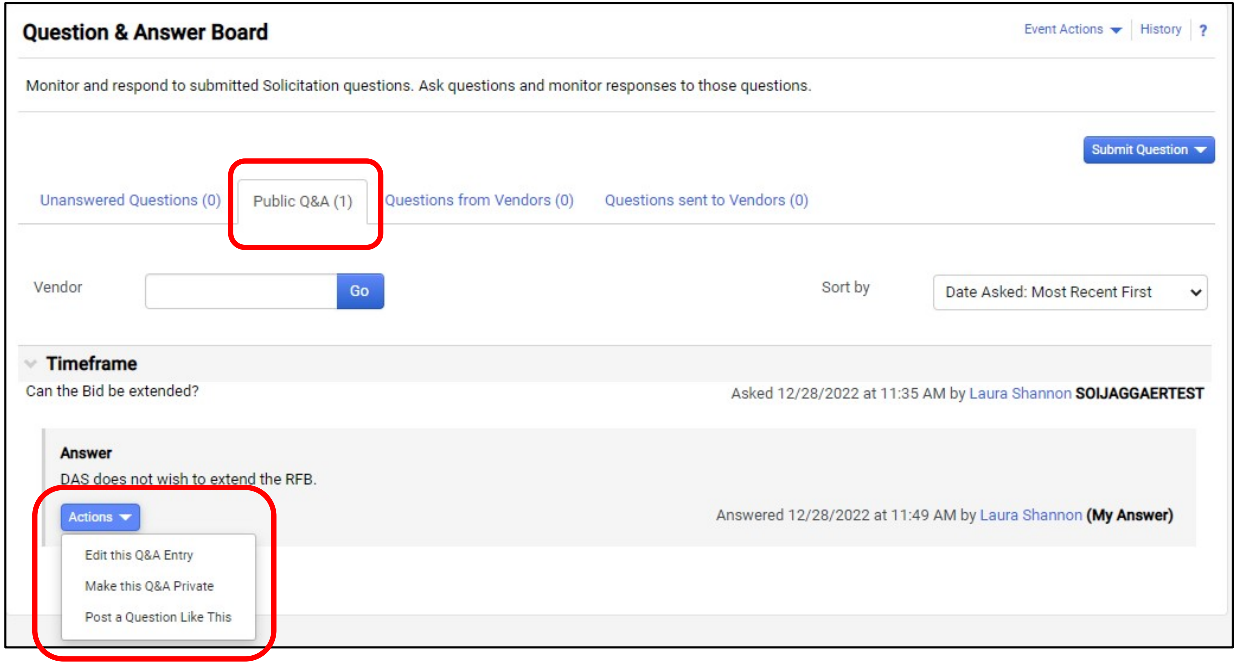
Question & Answer Board – Answer Question

Once the answer is posted, the Buyer may:

Edit the answer,

Make this Q&A Private, or

Post a Question Like This.



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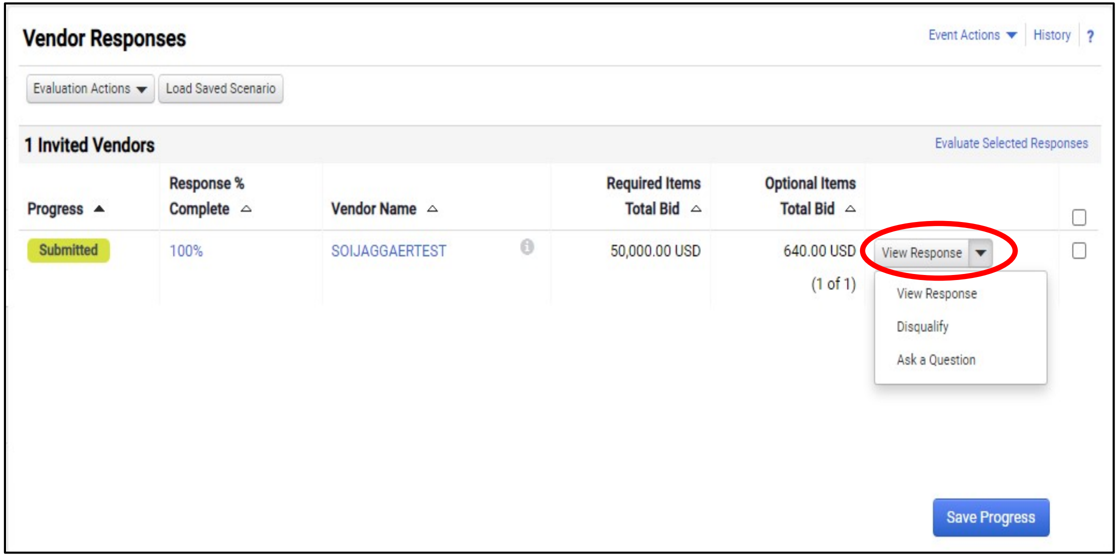
Evaluation

Award Actions

Evaluation

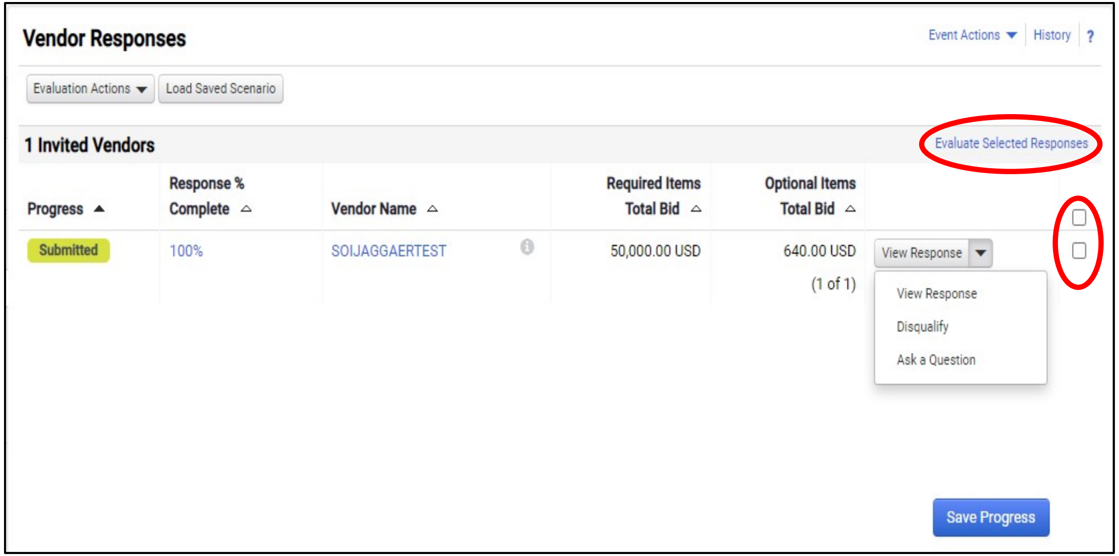
From the **Vendor Response** screen, select **View Response**. This is a quick way to **VIEW (not evaluate)** the responses from individual Bidders.

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



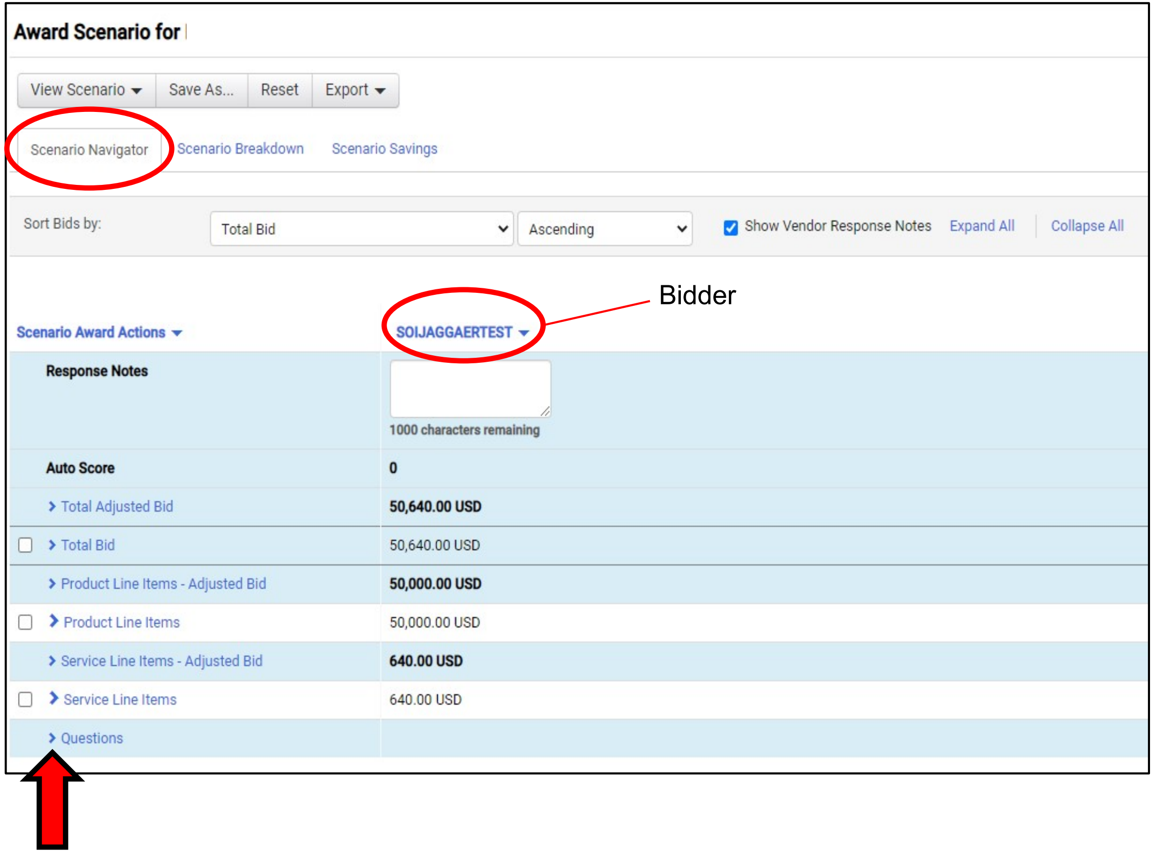
Evaluation

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



Evaluation

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



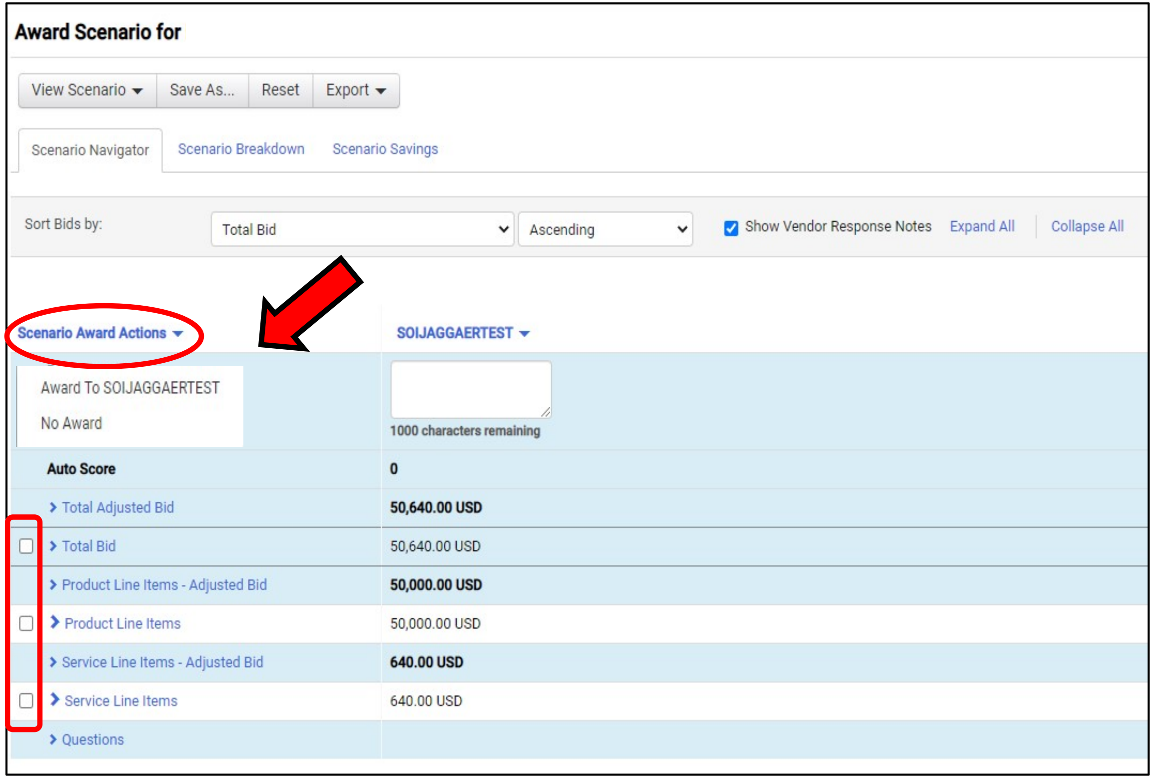
Each row can be expanded to see the Bidder responses for all the information asked for in the RFB.

Evaluation

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

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

Be sure to check the boxes that you are awarding.



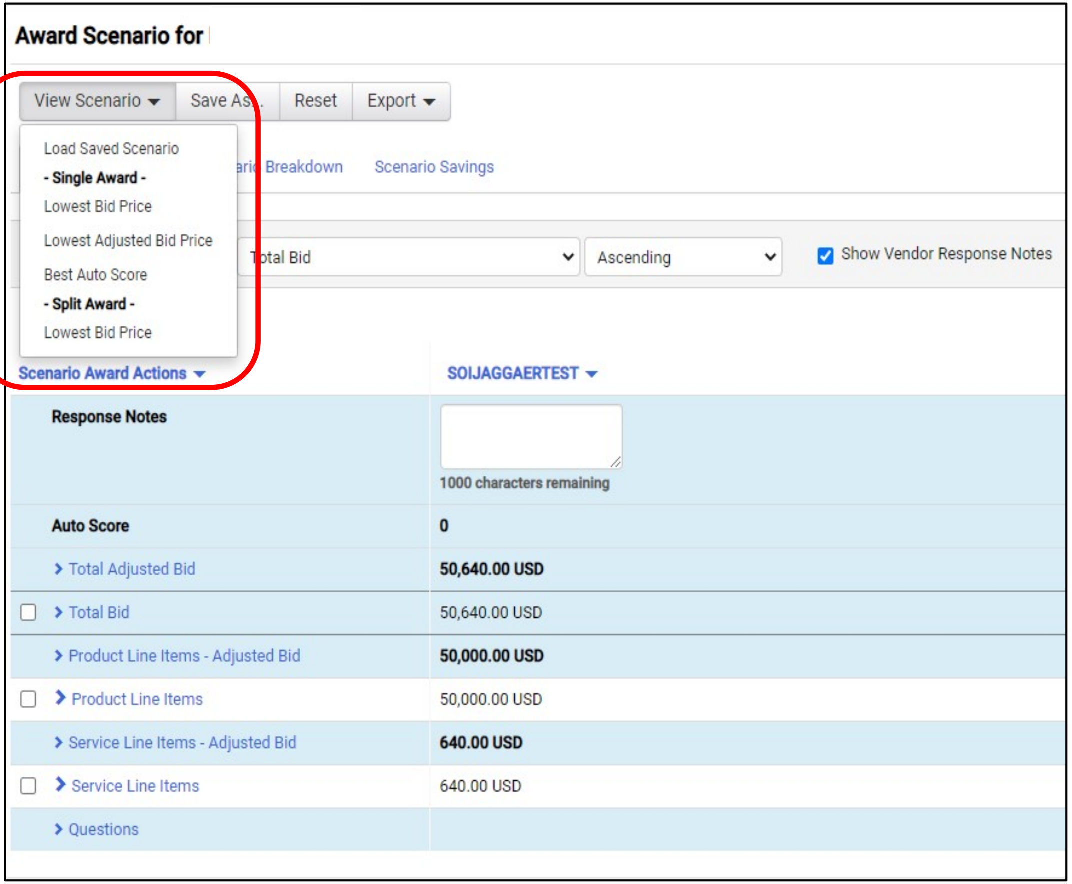
Evaluation – Using Scenario

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

Load their own Saved Scenario or;

Award to a single Bidder with the lowest price or;

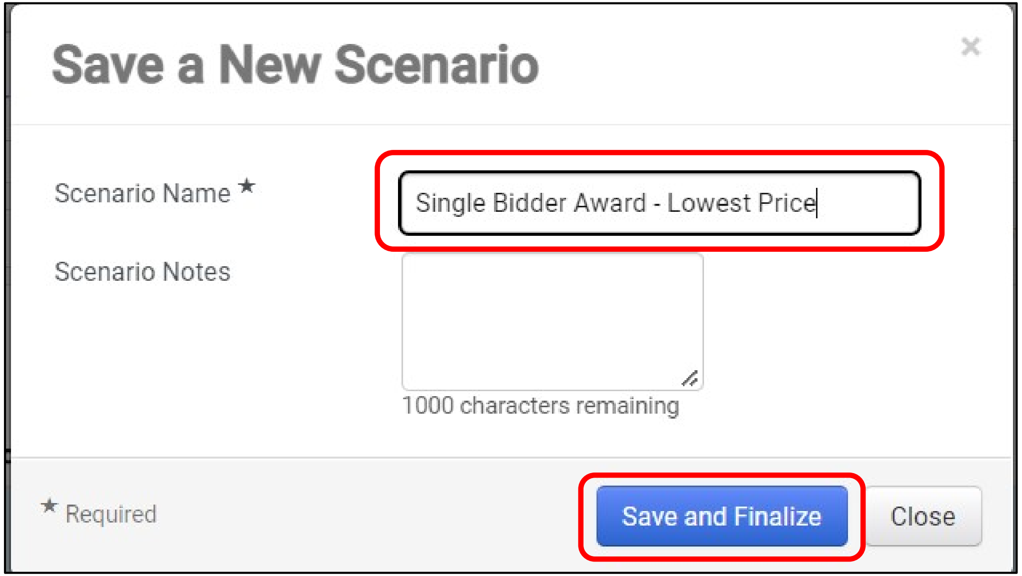
Award to a single Bidder with the lowest adjusted price.



Evaluation – Using Scenarios

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

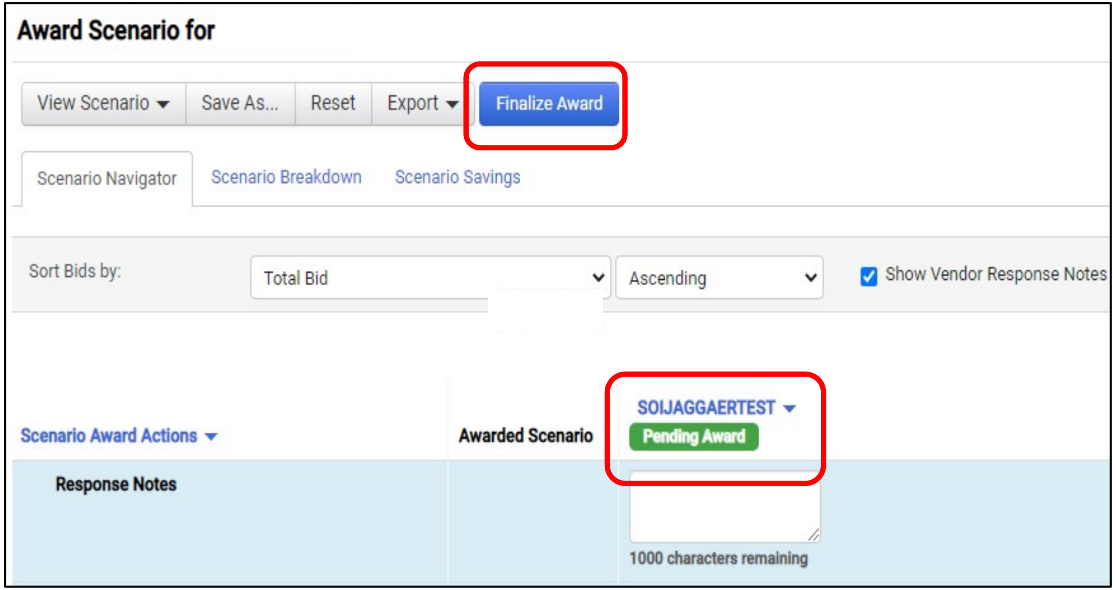
The Buyer names their scenario and selects Save and Finalize.



Evaluation – Using Scenarios

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

Select **Finalize Award**.

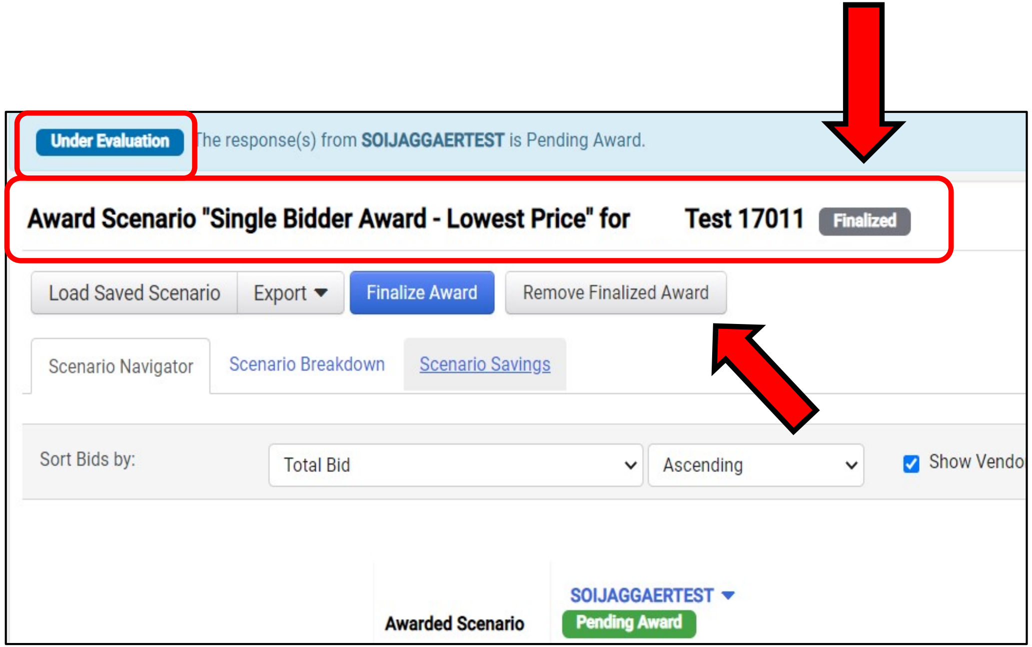


Evaluation – Using Scenarios

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

DO NOT SUBMIT FOR APPROVAL at this time.

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



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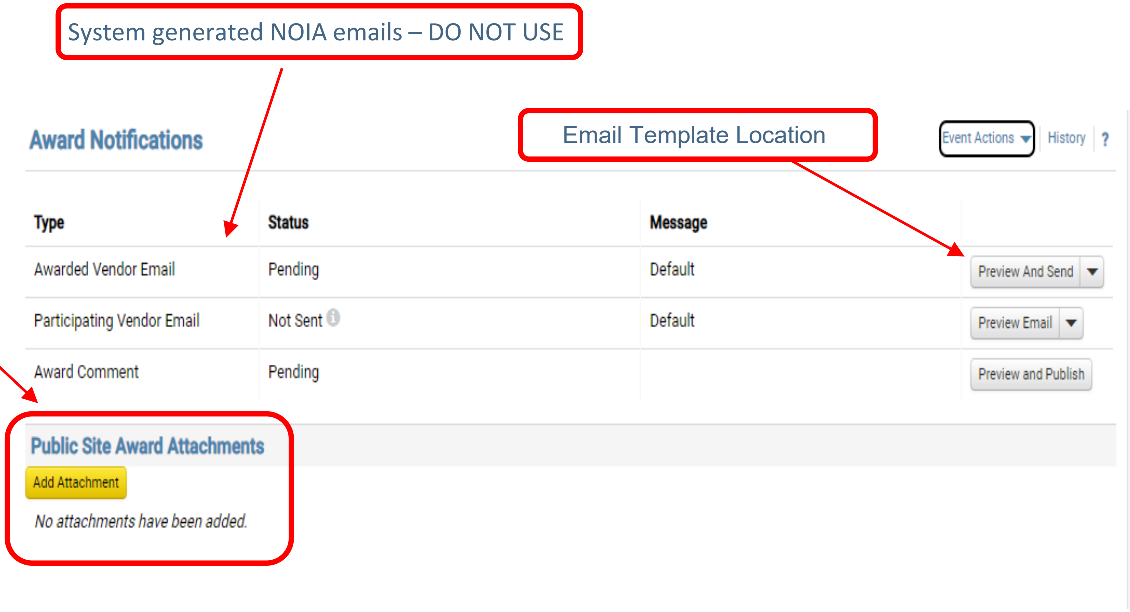
Award Notifications

Award Notifications

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

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

You may email the awarded and participating vendors at this time from *your* email account. The system Award Notifications should not be used. The system generated emails will not be active until the vendor is awarded, therefore the system emails will not be available until after the appeal period.



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.sciquest.com/apps/Router/SupplierLogin?CustOrg=DASIowa) and include additional information that includes: TIN, additional contacts, additional addresses (including fulfillment address) and order distribution information including the email address where the Purchase Order will be sent.

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

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

Award Notifications

Participating Vendor Email Template

Date

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

The following vendors submitted responses to the above solicitation:

Participating Vendors

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

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

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

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

Approvals

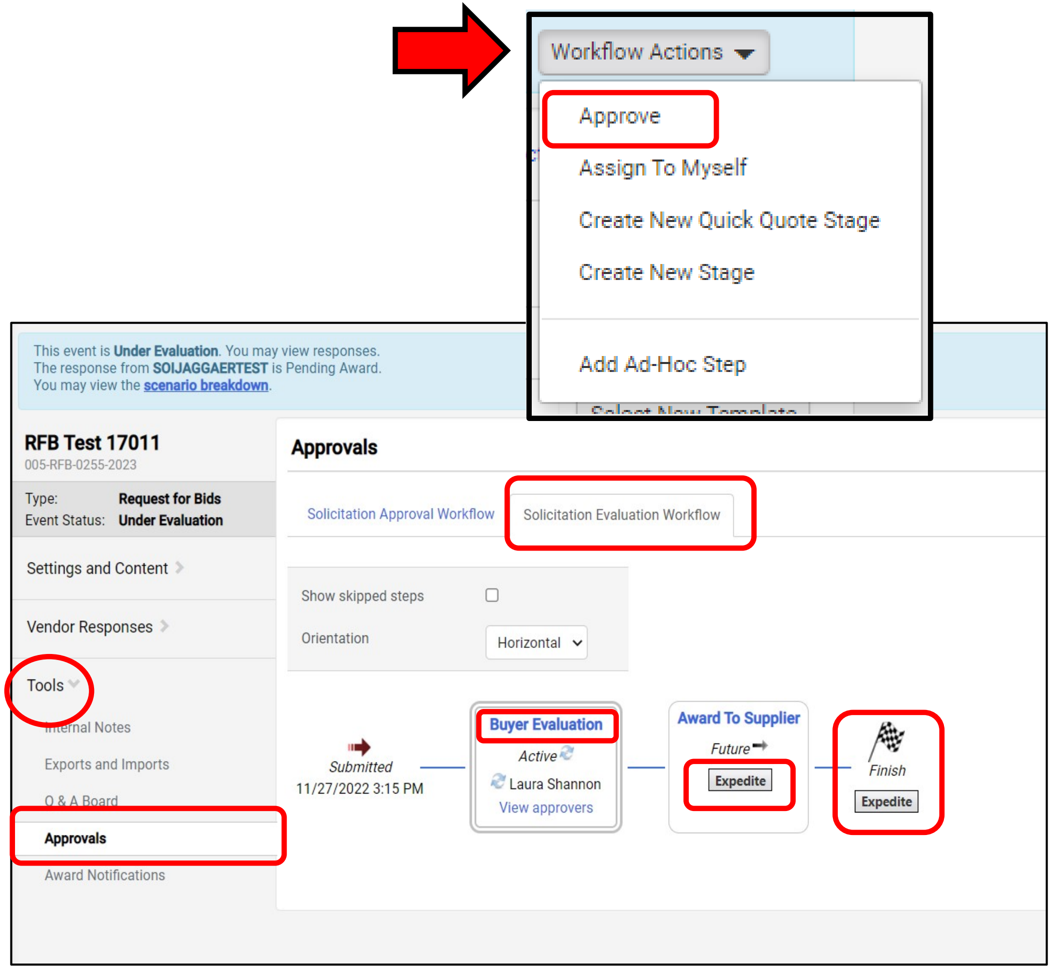
After the appeal period has ended, navigate to **Workflow Actions** and select **Approve**. The Pending Award Vendor is now Awarded.

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

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

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

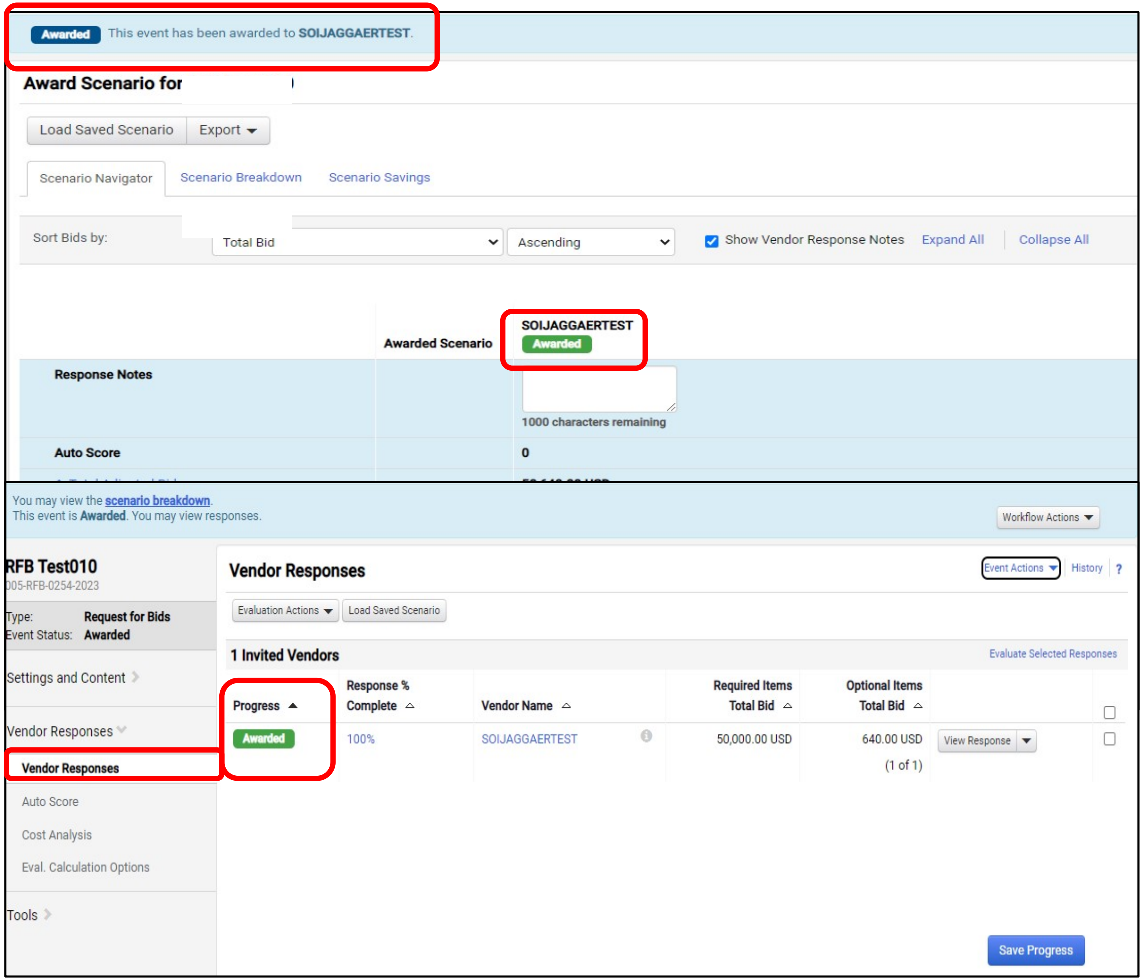
The Finish step will disappear after you navigate off the page.



Award

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

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



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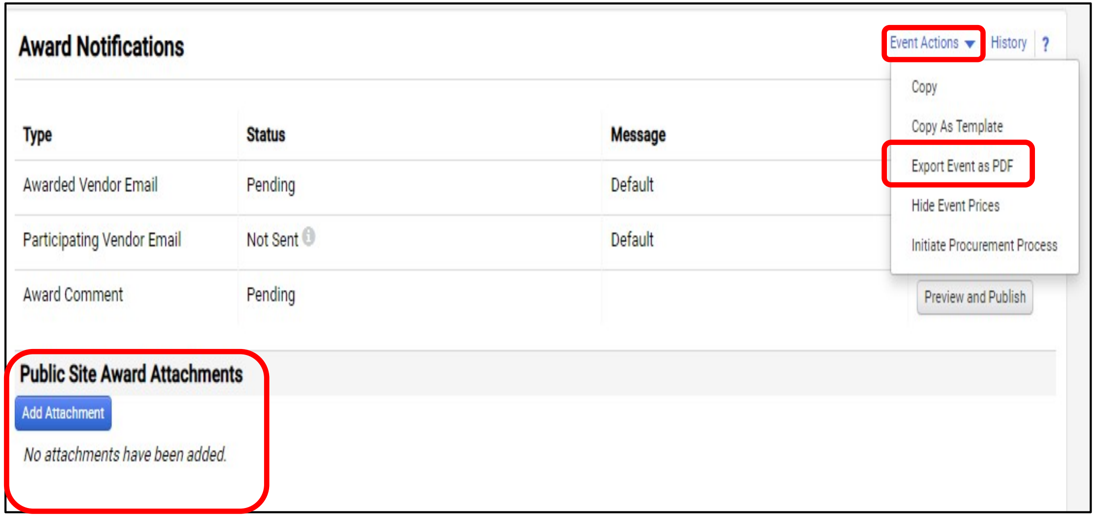
Export and Publish

Export and Publish

Under the **Tools/Award Notifications**:

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

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



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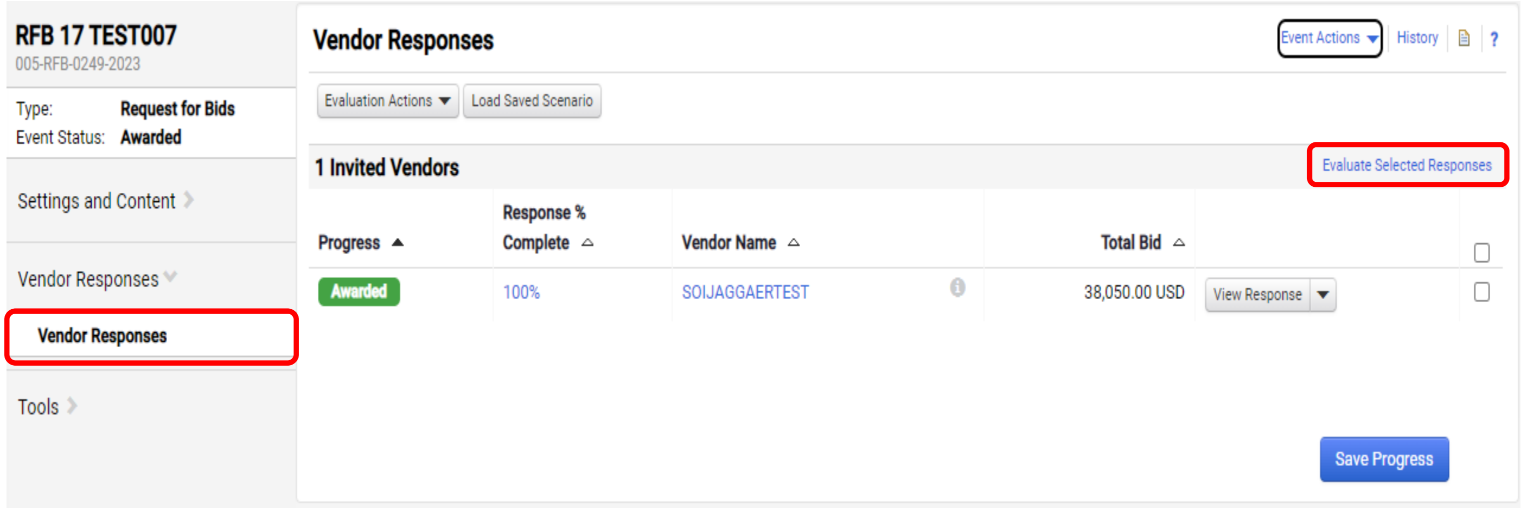
Initiate Contract

Create a Contract from a Sourcing Event

Step-by-Step Contract Creation from Sourcing Event



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

From the Award Scenario Page, Select Scenario Breakdown

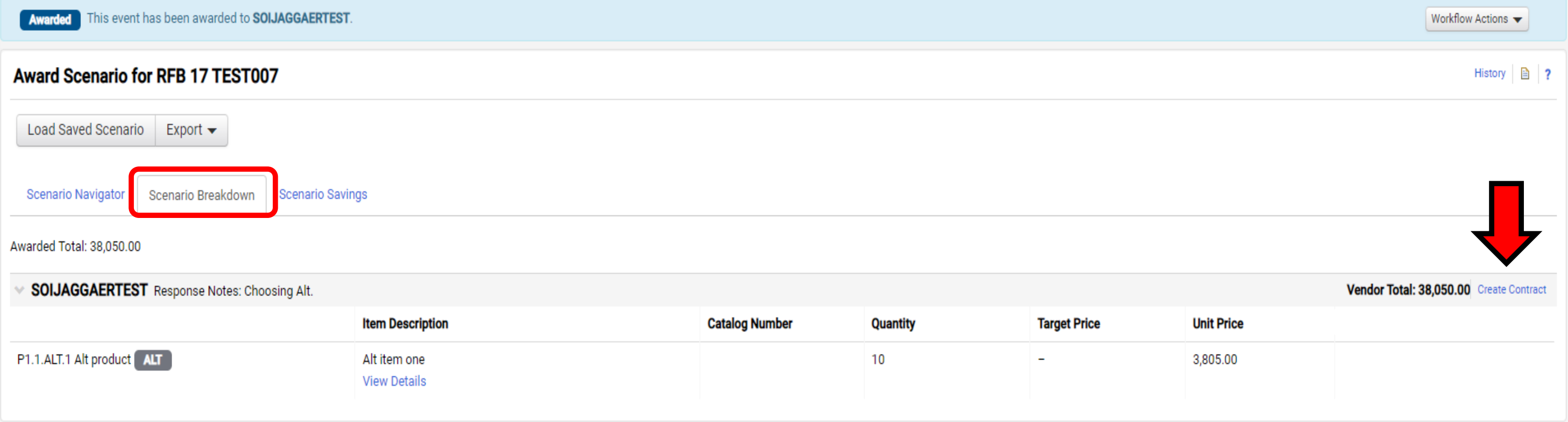
Step-by-Step Contract Creation from Sourcing Event

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.

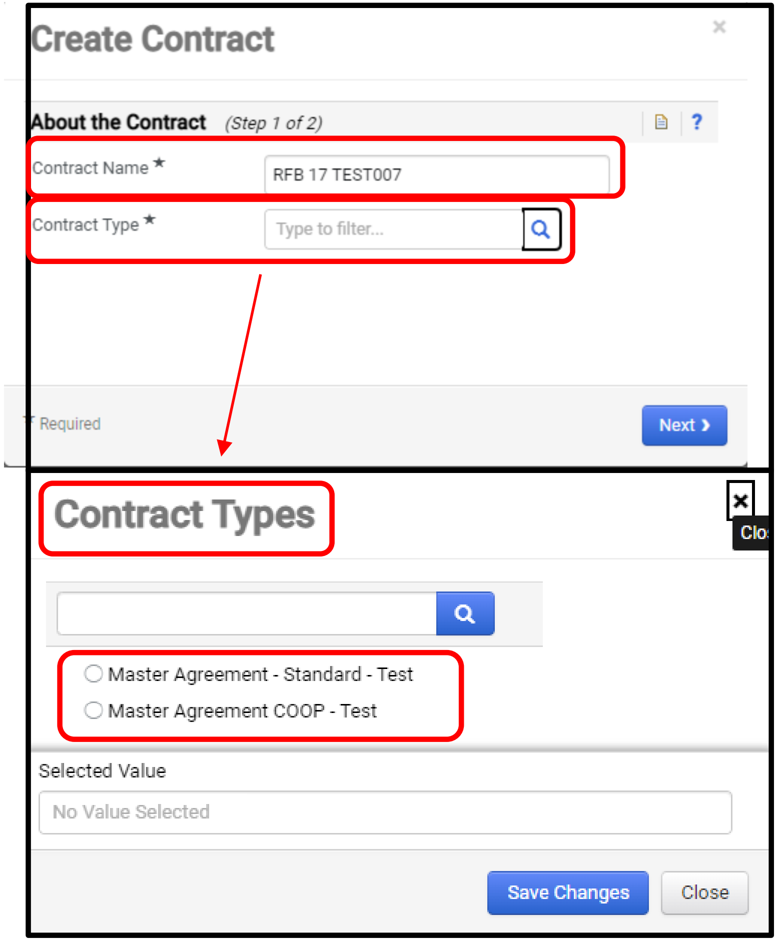


Step-by-Step Contract Creation from Sourcing Event

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.



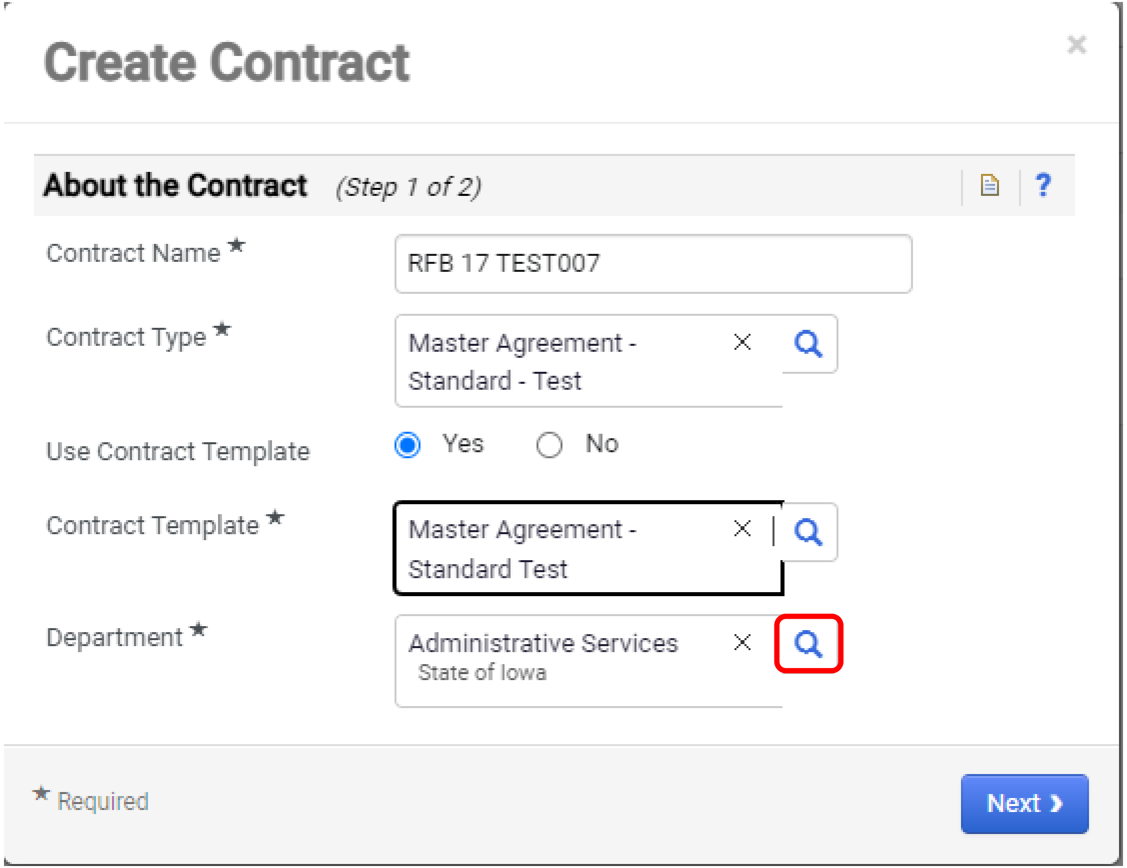
Step-by-Step Contract Creation from Sourcing Event

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**.

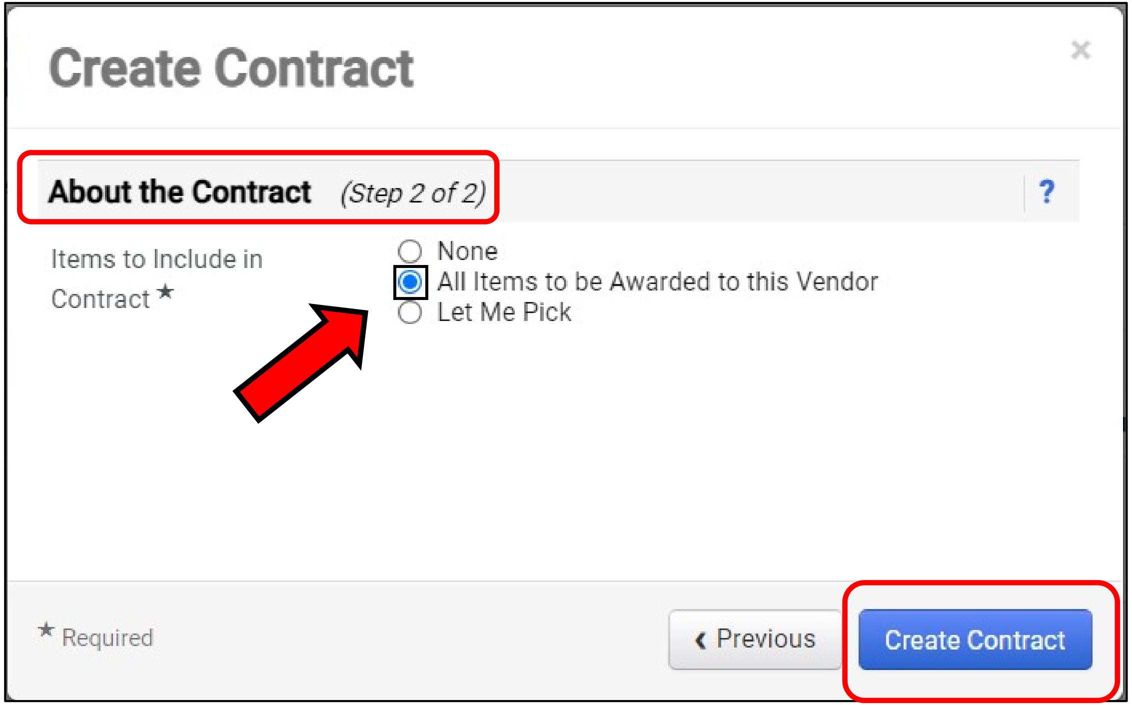


Step-by-Step Contract Creation from Sourcing Event

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**.

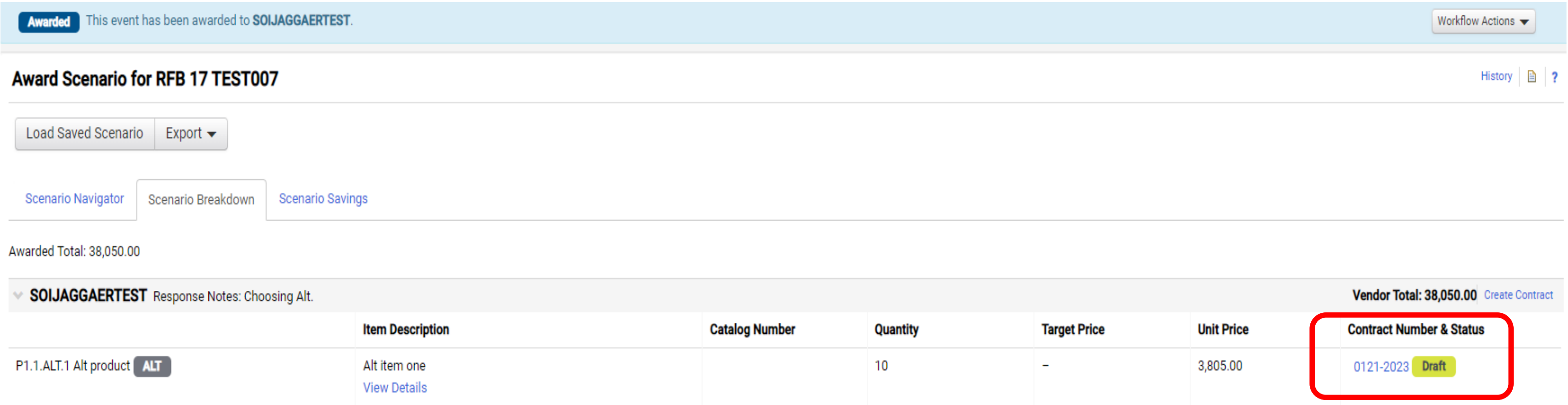


Step-by-Step Contract Creation from Sourcing Event

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.



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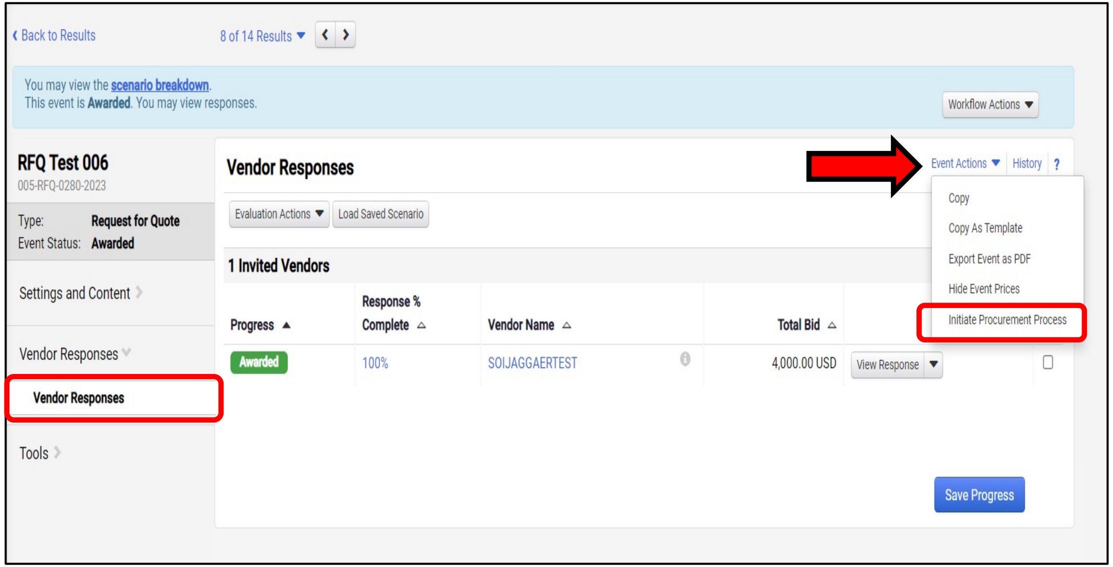
Initiate Procurement Process

Initiate Procurement Process

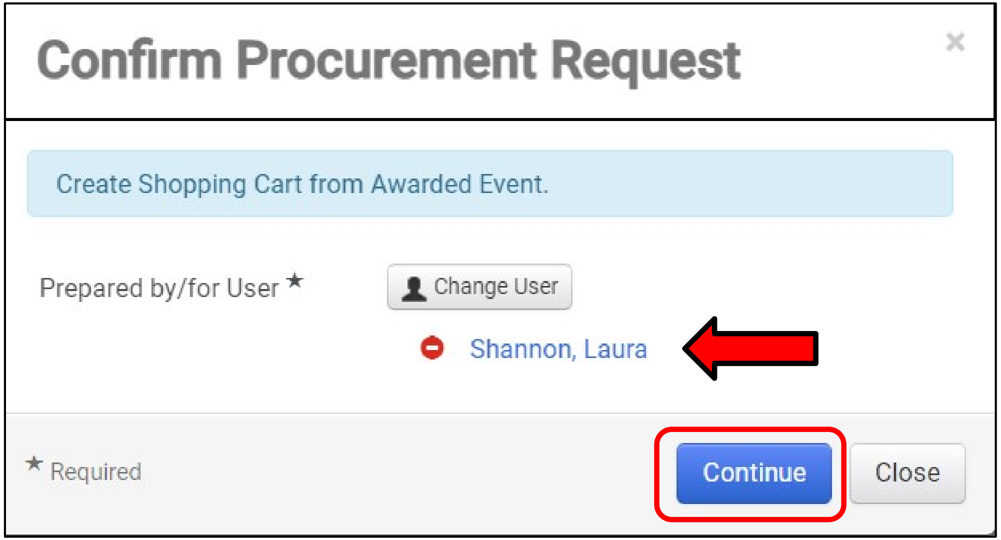
To create a purchase requisition from the RFB, navigate to Vendor Responses Wizard and click on the **Event Actions** dropdown menu and select **Initiate Procurement Process**.



Initiate Procurement Process

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

When done select **Continue.**



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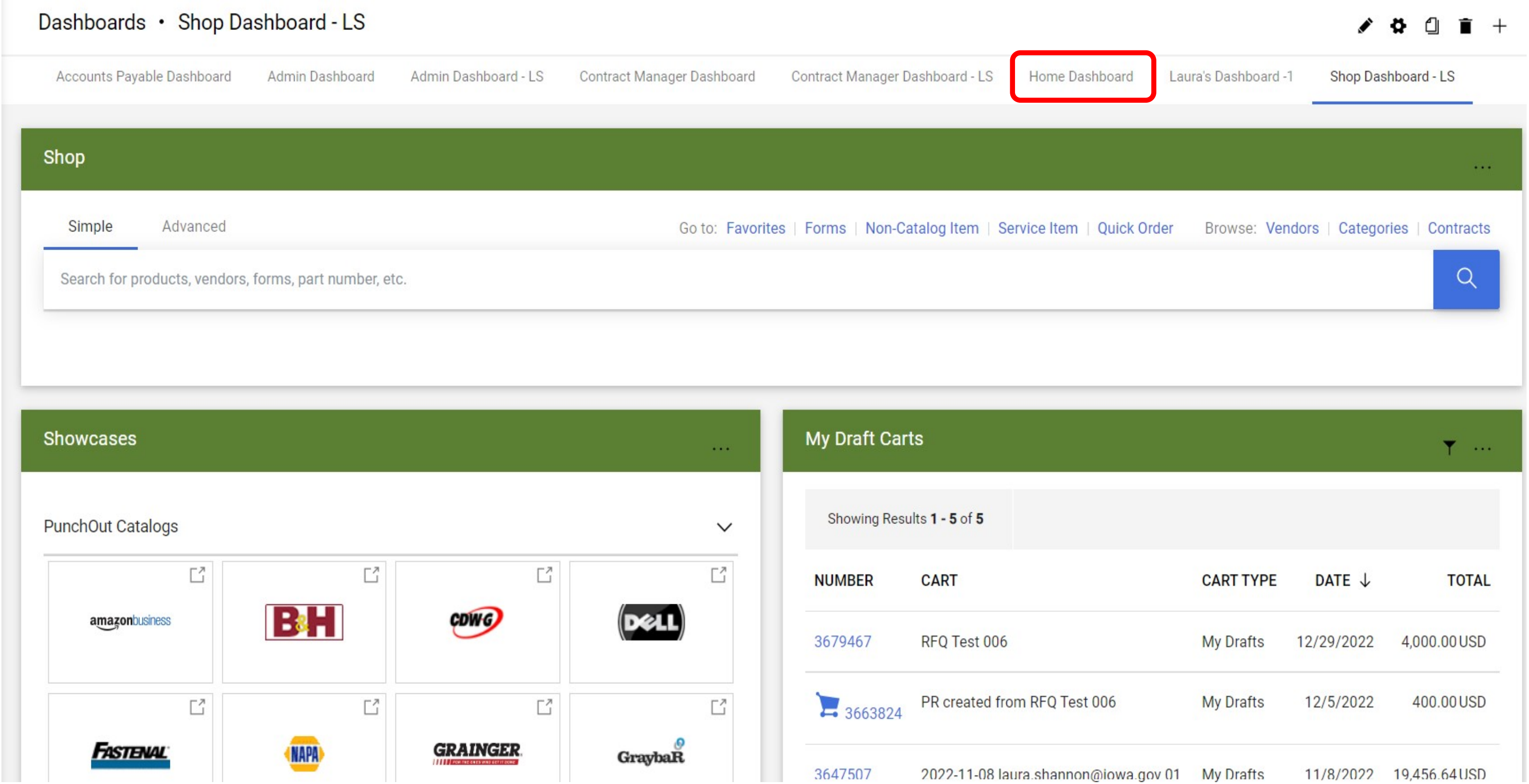
Create a Purchase Requisition

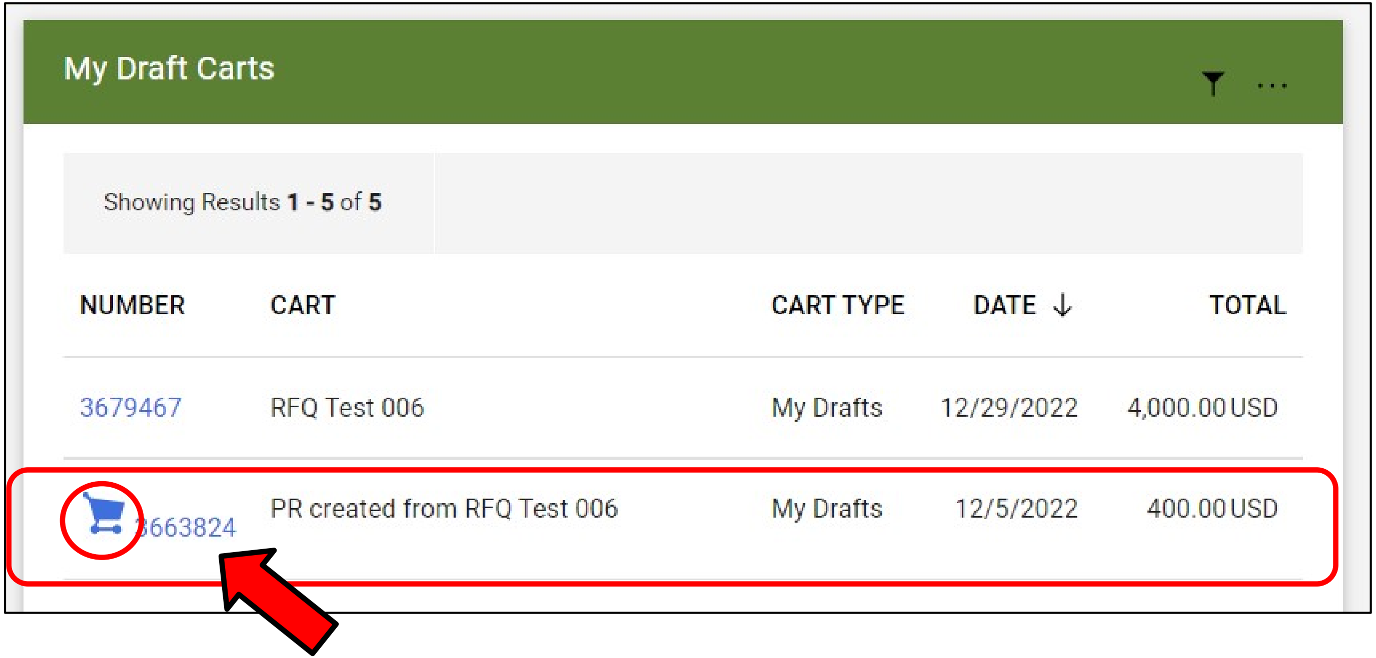
Purchase Requisition (PR)

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



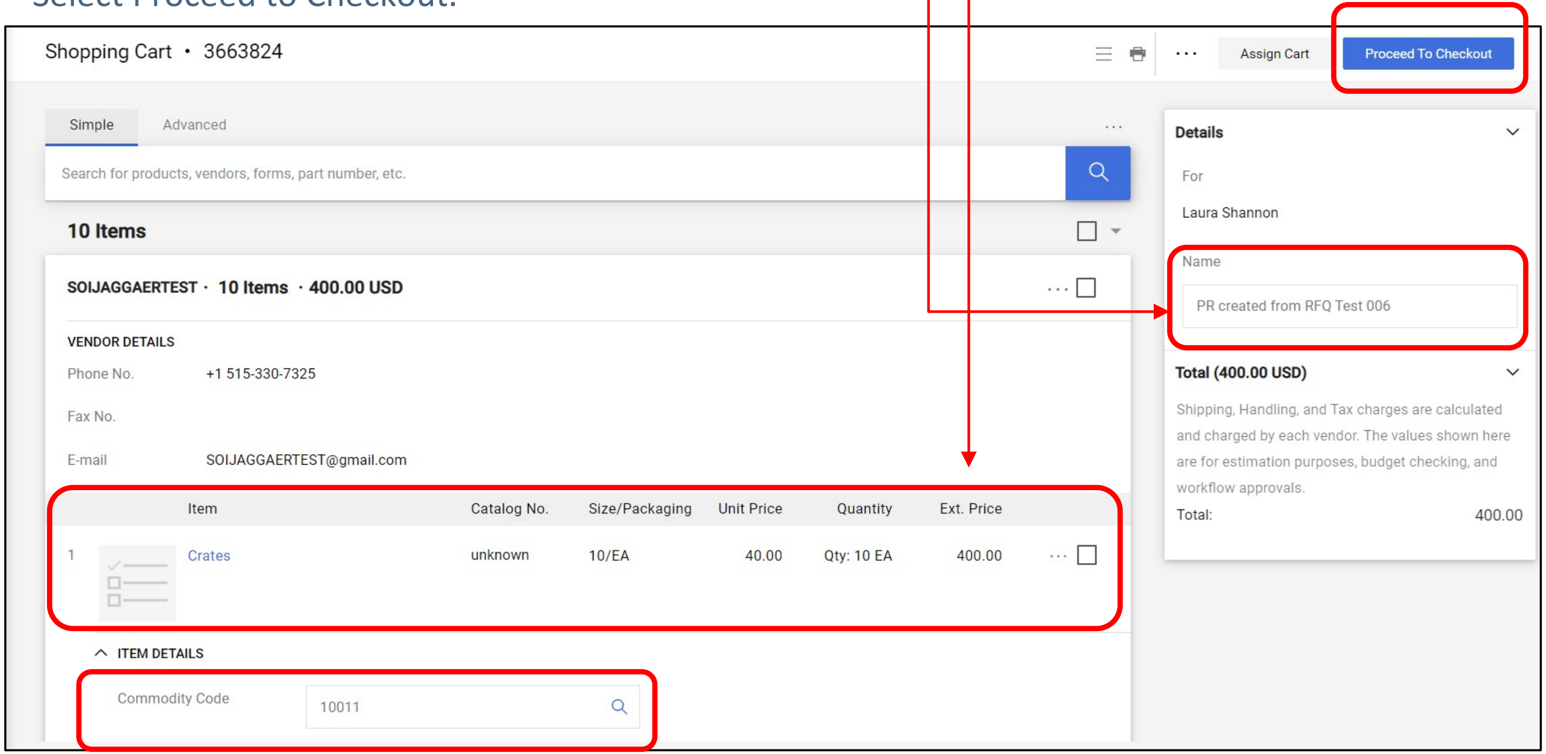
Purchase Requisition (PR)

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



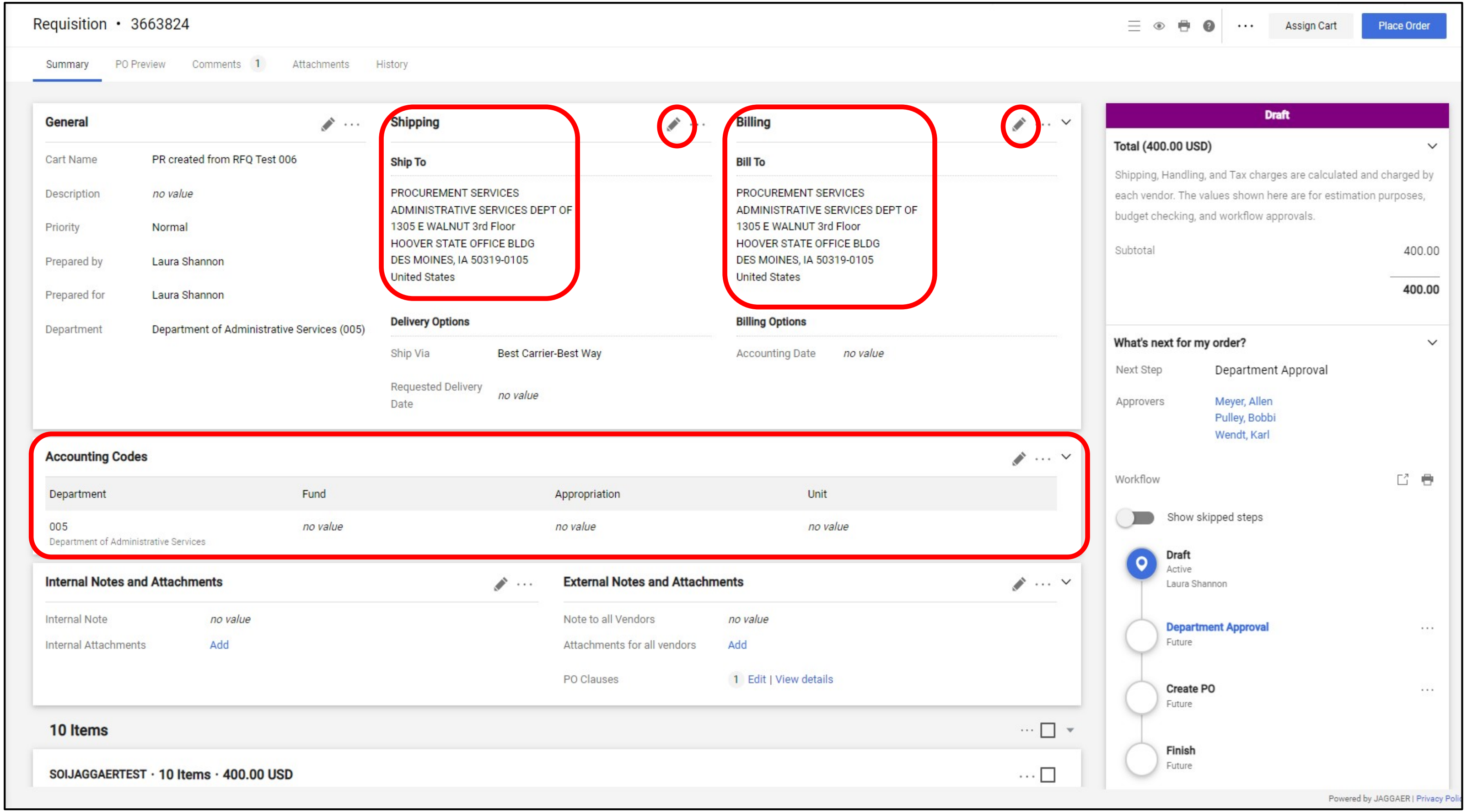
Purchase Requisition (PR)

Check that the information is correct on the PR lines.
Check if the Commodity Code is correct.
Enter a name for the Purchase Requisition.
Select Proceed to Checkout.



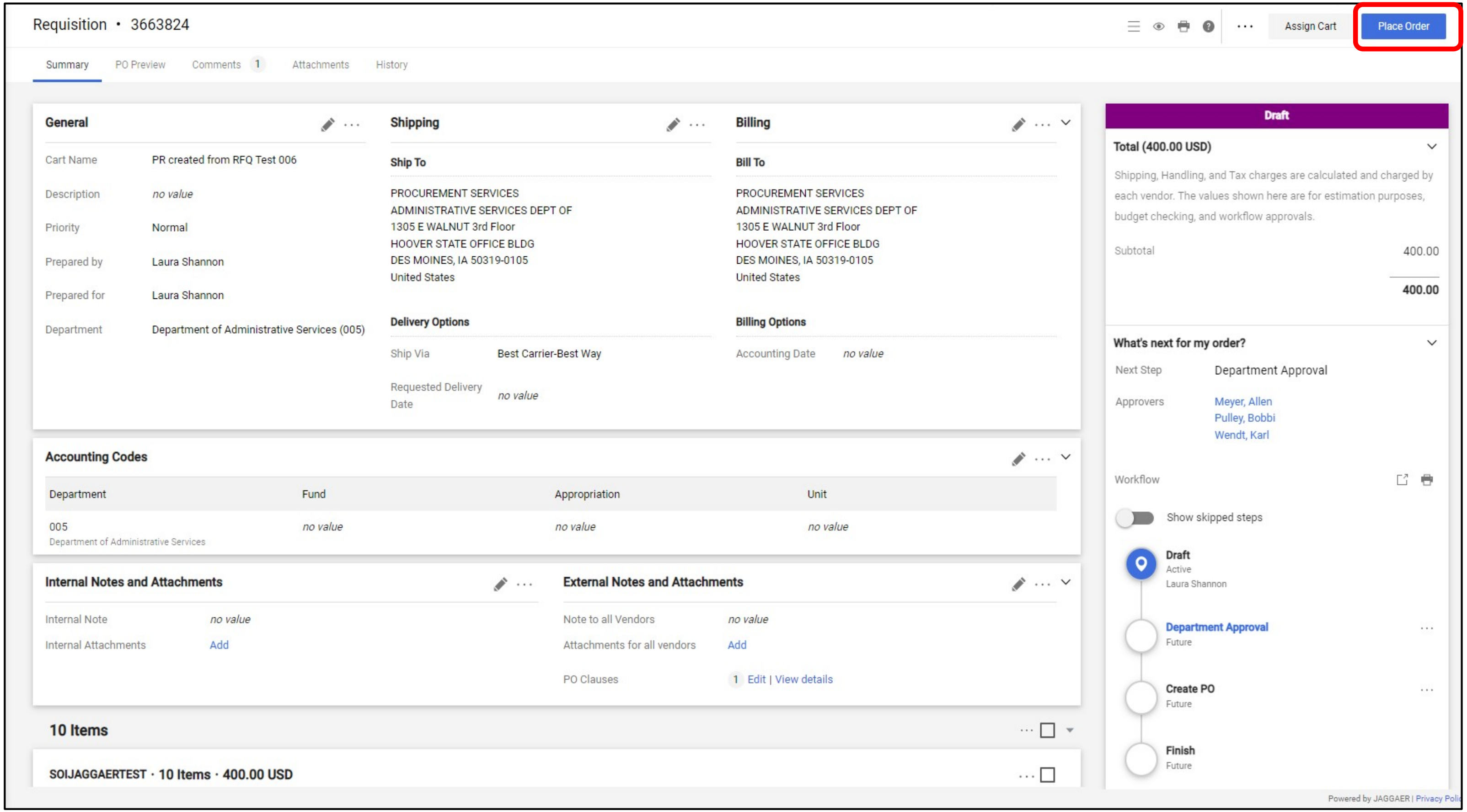
Purchase Requisition (PR)

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



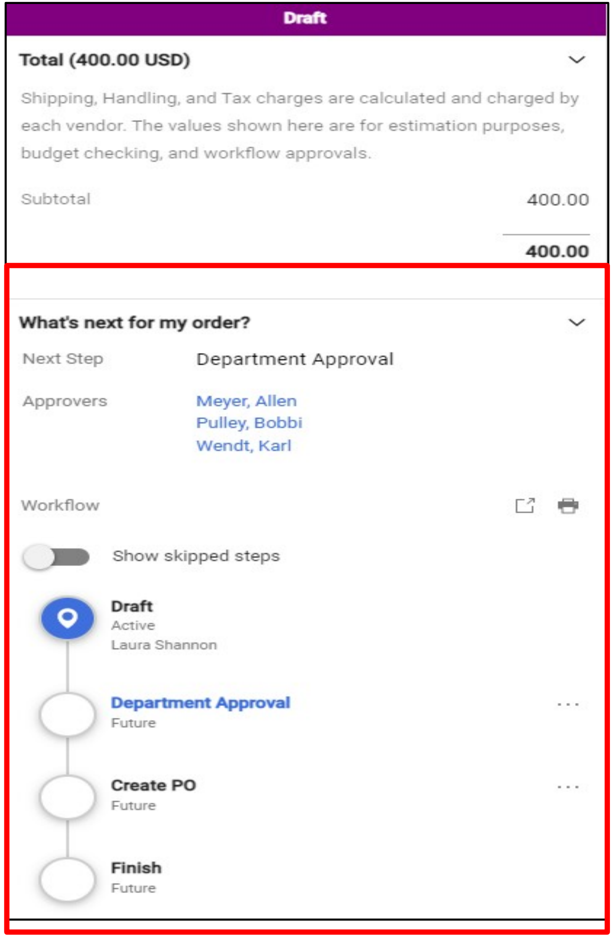
Purchase Requisition (PR)

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



Purchase Requisition (PR)

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



Purchase Requisition (PR)

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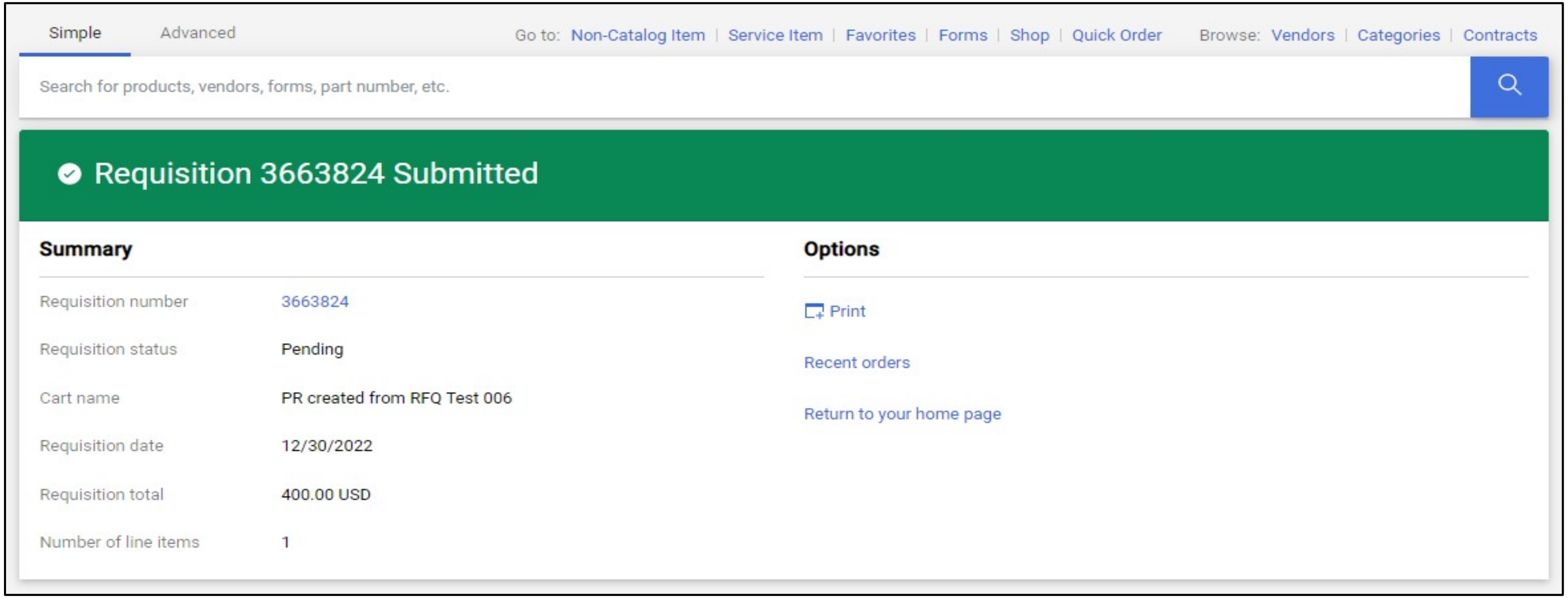
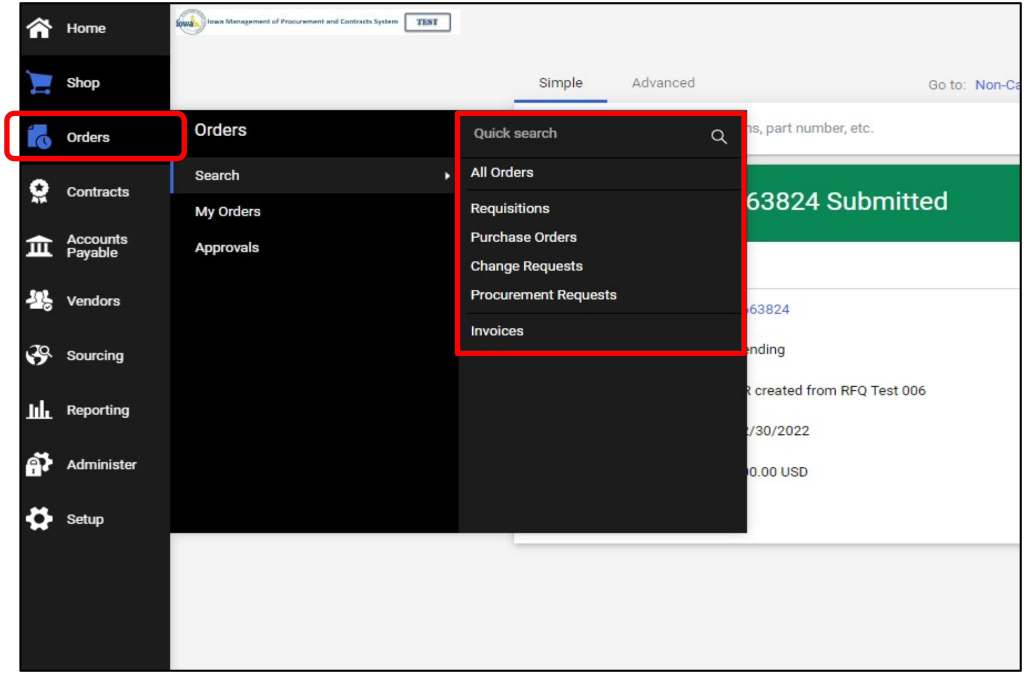


Purchase Requisition (PR)

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



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Questions?

Contact:

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