



Iowa Management of Procurement and Contracts System

Posting RFx to TSB Step-by-Step Guide

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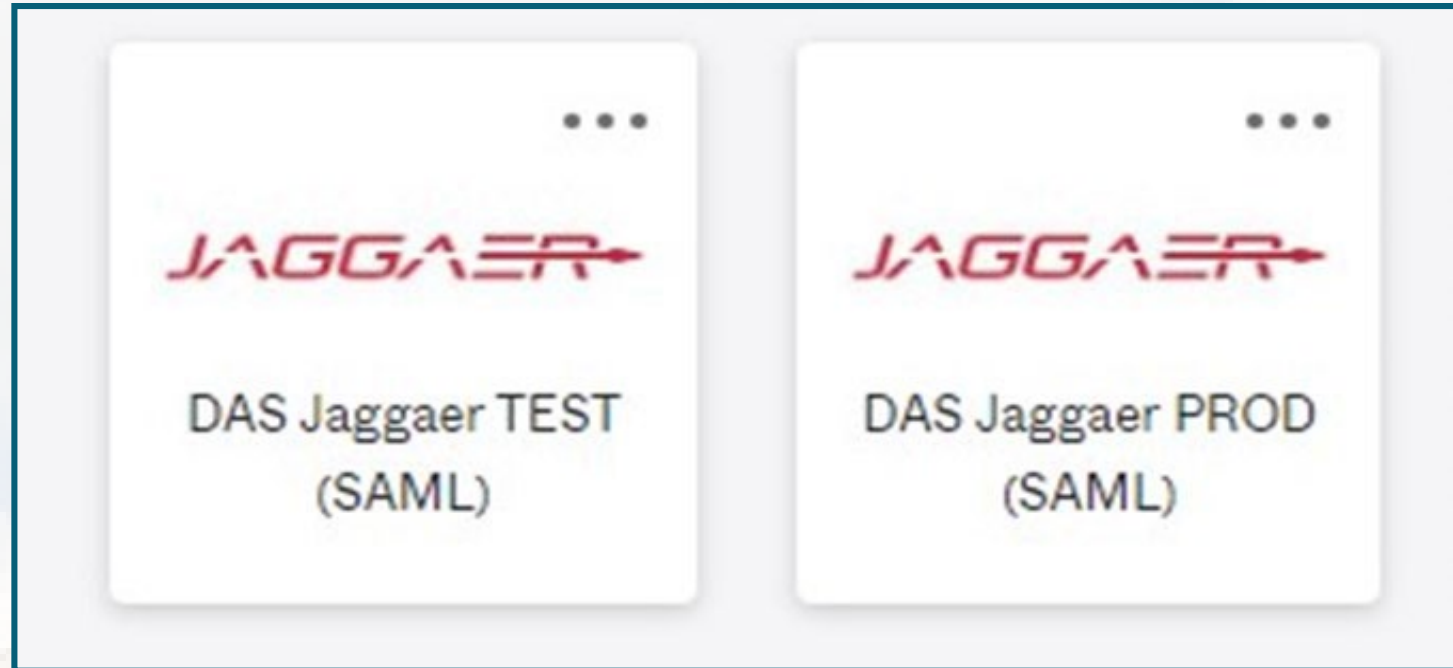
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Sign into Okta and locate the Jaggaer stickers



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

Menu

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

The screenshot shows the Iowa IMPACS Shop Dashboard. A red box highlights the left sidebar menu, which contains the following items: Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Sourcing, Reporting, Administer, and Setup. At the bottom of this menu is a 'Menu Search' field and a small left-pointing arrow icon. A red arrow points from the text box on the left to this arrow icon. The main content area of the dashboard includes a 'Shop' section with a search bar, a 'Showcases' section with 'PunchOut Catalogs' (listing Amazon Business, BH, CDWG, DELL, FASTENAL, NAPA, GRAINGER, and GraybaR), and a 'My Draft Carts' section with 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

Create Solicitation

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

Home
Shop
Orders
Contracts
Accounts Payable
Vendors
Sourcing
Reporting
Administer
Setup

Dashboards • Solicitations Dashboard - LS

Accounts Payable Dashboard Admin Dashboard Admin Dashboard - LS Contract Man

My Events

Total Solicitations: 25

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

Sourcing

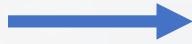
- Solicitations
- Approvals
- Templates and Libraries
- Reports
- Requests
- Sourcing Administration

Quick search

- Solicitations Home
- Search Events
- Create New Event...
- Create New Quick Quote Event
- Sourced Contract Advance Notice
- View Exports

Create New Event

You will see this pop-up screen



1. Enter the **Title** of the RFx.
2. Search for your department by clicking the **Search** icon (magnifying glass).

Create Solicitation

About the Solicitation *(Step 1 of 2)*

Event Title ★

Department ★

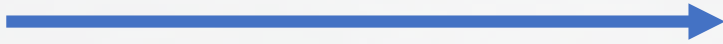
Department Name



★ Required

Next >

After clicking Search, you will see this pop-up screen



Select the arrow next to the appropriate Department tree.

Departments

Q

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

Selected Value

No Value Selected

Save Changes

Close

There are three sections of the department tree:

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

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

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

Departments

Q

☐ Elected Officials

☐ Agriculture and Land Stewardship - IDALS

☐ Agriculture - Cattle Promotion

☐ Agriculture - Corn Promotion

☐ Agriculture - Development Authority

☐ Agriculture - Egg Council

☐ Agriculture - Soil Conservation

☐ Agriculture - Soybean Promotion

☐ Agriculture - Turkey Marketing Council

☐ Loess Hills Development & Conservation Authority

☐ Attorney General - Department of Justice

☐ Auditor of State

☐ Governor's Office

☐ Judicial Branch

☐ Legislative Branch

☐ Secretary of State - SOS

☐ Treasurer of State - TOS

☐ INACTIVE

☐ Schools

☐ State of Iowa Cabinet Agencies

☐ State of Iowa Non-Cabinet Agencies

Selected Value

No Value Selected

Save Changes

Close

Departments

Q

☐ Elected Officials

☐ INACTIVE

☐ Schools

☐ State of Iowa Cabinet Agencies

☐ Administrative Services - DAS

☐ Corrections - DOC

☐ Economic Development Authority - IEDA

☐ Education - DE

☐ Health and Human Services - DHHS

☐ Homeland Security & Emergency Management - HSEMD

☐ Inspection, Appeals & Licensing - DIAL

☐ Insurance & Financial Services - DIFS

☐ Iowa Workforce Development - IWD

☐ Management - DOM

☐ Natural Resources - DNR

☐ Public Defense - DPD

☐ Public Safety - DPS

☐ Revenue - IDR

☐ Transportation - DOT

☐ Veterans

☐ State of Iowa Non-Cabinet Agencies

Selected Value

No Value Selected

Save Changes

Close

Departments

Q

☐ Elected Officials

☐ INACTIVE

☐ Schools

☐ State of Iowa Cabinet Agencies

☐ State of Iowa Non-Cabinet Agencies

☐ Board of Parole

☐ Board of Regents

☐ Campaign Finance Disclosure Commission

☐ Department for the Blind

☐ Executive Council

☐ Iowa Communications Network - ICN

☐ Iowa Law Enforcement Academy

☐ Iowa Public Employees Retirement System - IPERS

☐ Iowa Utilities Division - IUB

☐ Office of Energy Independence

☐ Public Employment Relations Board

☐ Public Information Board

☐ Rebuild Iowa Office

☐ State Fair Foundation

Selected Value

No Value Selected

Save Changes

Close

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

Select RFB – Attach Document Wrapper (or any RFx - Attach Document Wrapper Event Type)

The **Template** will automatically populate.

Click on **Create Solicitation**.

Create Solicitation ×

About the Solicitation (Step 2 of 2) ?

Event Type ★ ? 🔍

Create from Template 🔍

★ Required ◀ Previous Create Solicitation

Create Solicitation ×

About the Solicitation (Step 2 of 2) ?

Event Type ★ ? × 🔍

Create from Template ★ × 🔍

★ Required ◀ Previous Create Solicitation

Setup Wizard

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

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

Type: **DHHS - Request for Proposal**

Event Status: **Draft**

Settings and Content ▾

Setup ▲

Users ✓

Description ✓

Buyer Attachments 0

Vendors 0

Review and Submit ▲

Tools >

Event Title ★
RFP Test 003

Event Type ⓘ
DHHS - Request for Proposal

Department
Health & Human Services - DHHS

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

▼ **Commodity Codes**

Reporting Commodity Code - Edit

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes

▼ **Display and Communication**

Visible to Public Yes

Public Event Short Description

200 characters remaining

Restrict Buyer Notifications Yes

▼ **Dates**

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

Open Date ★

mm/dd/yyyy hh:mm a

Close Date ★

★ Required

Save Progress Next >

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

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

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

Settings and Content ▾

Setup ⚠

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

Tools >

Setup

Event Title * RFP Test 003 #1

Event Type ⓘ DHHS - Request for Proposal

Department Health & Human Services - DHHS

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

▼ **Commodity Codes**

Reporting Commodity Code - Edit #3

Additional Commodity Codes - Edit

Forced Vendor Invitation by Commodity Code Yes

▼ **Display and Communication**

Visible to Public Yes

Public Event Short Description
200 characters remaining

Restrict Buyer Notifications Yes

▼ **Dates**

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

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

Close Date *

★ Required

Save Progress Next >

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

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

Commodity Codes

×

Q

< > 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

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

Select the Commodity Code that best fits your RFx.

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

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

Commodity Codes

Laptop

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

Close

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

RFP Test 003

401-RFP-HHS-0012-2024

Type: **DHHS - Request for Proposal**

Event Status: **Draft**

Settings and Content ▾

Setup

Users

Description

Buyer Attachments

Vendors

Review and Submit

Tools >

Setup

Event Actions ▾ | History | ?

Event Title *

RFP Test 003

Event Type ⓘ

DHHS - Request for Proposal

Department

Health & Human Services - DHHS

Event Number *

401-RFP-HHS-0012-2024 ✎

▼ Commodity Codes

Reporting Commodity Code -

Edit

Additional Commodity Codes -

Edit

Forced Vendor Invitation by Commodity Code Yes

▼ Display and Communication

Visible to Public Yes

Public Event Short Description

200 characters remaining ✎

Restrict Buyer Notifications Yes

▼ Dates

Time Zone

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

Open Date *

mm/dd/yyyy hh:mm a

Close Date *

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

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

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

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

Continue filling out the **Close Date**.

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

▼ Dates

Time Zone

CDT/CST - Central Standard Time (US/Cent ▼)

Release Date ⓘ

mm/dd/yyyy hh:mm a

Open Date ★

mm/dd/yyyy hh:mm a

Close Date ★

mm/dd/yyyy hh:mm a

◀ 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

★ Required

Save Progress

Users Section

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

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

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

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

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

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

Generic RFP Test

005-RFP-0311-2023

Type: Request for Proposal

Event Status: Draft

Settings and Content

Setup

Users

Description

Prerequisites

Buyer Attachments

Vendor Attachments

Questions

Additional Item Fields

Price Components

Items

Vendors

Review and Submit

Tools

Users

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:

Shannon, Laura

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

Role: Admin (2 users)

Role: Procurement (0 users)

Department: Department of Administrative Services (005) (13 users)

Contacts

Contact information for these users is shown to vendors:

Shannon, Laura

Stakeholders

Stakeholders can view the event and responses:

No User Selected

Notification Recipients

Only Notification Recipients will be eligible to receive system-generated event notifications.

Shannon, Laura

★ Required

Event Actions

History

Previous

Save Progress

Next

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

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

User Search

Q

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

Description Section

The **Description** Field is filled out with information about the RFx. Your template may have specific language pre-populated.

Pull down the slide icon to expand the field.

The Buyer may add to the existing language.

The formatting controls are similar to Microsoft Word.

Save Progress or **Next**.

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

Type: **DHHS - Request for Proposal**

Event Status: **Draft**

Settings and Content ▾

Setup ⚠

Users ✓

Description ✓

Buyer Attachments 0

Vendors 0

Review and Submit ⚠

Tools >

Description Event Actions ▾ History ?

Copy from Library

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

Format (inherited font) (inherited size) **B** *I* U **abc** **A**

X₂ X₃ </>

Do not upload proposals or questions to this system. Follow the submission instructions in the attached document to ask questions and/or to submit a proposal directly to the Department of Health and Human Services. **Do NOT** submit proposals electronically to this system.

★ Required < Previous Save Progress Next >

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Description

Buyer Attachments

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

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

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

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

Buyer Attachments

Event Actions | History | ?

Add Attachment

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

< Previous

Save Progress

Next >

Buyer Attachments

History | ?

Add New Attachment

1-8 of 8 Results

10 Per Page

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

- Actions
- Edit Properties
- Download
- Delete

Add Attachment

Attachment Type

File

Link

File

Select files...

Drop files to attach, or browse.

Maximum upload file size: 200.0 MB

Comments

1000 characters remaining

Display Order

Last

Required

Save Changes

Close

Vendors Section

Vendors Invited by Commodity Code

Add Vendors to the Event

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

RFP Test
005-RFP-0414-2023

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

Settings and Content ▾

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

Tools >

Vendors

Event Actions ▾ | History | ?

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

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

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

◀ Previous

Save Progress

Next ▶

Vendors Invited by Commodity Code

The Buyer may add Vendors to be notified manually.

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

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

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

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

Vendors

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

Manually Invite Vendors

Search Registered Vendors Show Advanced Search

Vendor

Relationship All

Vendor Contact

Zip Code Within 5 Miles

Commodity Code Edit

NAICS Code Type to filter... Search

Clear

Previous Save Progress Next

Vendors

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

Saved Searches Manually Invite Vendors

Modify Search

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

Add Vendors to Event by Searching

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

Click on the Manually Invite Vendors Dropdown box.

Select **Add Vendor to Event**

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

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

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

Vendors Event Actions History ?

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

Search Registered Vendors

Vendor

Relationship

Vendor Contact

Zip Code Within

Commodity Code

NAICS Code

Manually Invite Vendors ▼

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

Add Vendor to Event ×

Vendor Name ★

Sales or Corporate Contact Name

Email ★

★ Required

Add Vendors to Event – Manually Invite

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

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

manually/inviteSuppliersTemplate (3) [Comp]

File Home Insert Draw Page Layout Formulas Data Review View Help Tell me what you want to do

Cut Copy Paste Format Painter Clipboard Font Alignment Number Conditional Formatting Table

Calibri 11

Wrap Text Merge & Center

General \$ % .00

Normal Check Cell

E33

A B C D E F G H I J K

Introduction

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

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

Key Features of Manually Invited Suppliers Import

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

Manually Invited Supplier Import Fields

Some key information regarding the import format:

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

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

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

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

Instructions Import Data

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

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

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

Import Vendors

Supported file types are: .xlsx and .xls

Import Action

Validate

File Name [★]

Choose File

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

Submit

Close

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

Refresh the page often.

Download the validated file and save it to your computer.

RFB 17 Test 002
005-RFB-0240-2023

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

Settings and Content >

Vendor Responses >

Tools ▾

- Internal Notes
- Exports and Imports**
- Q & A Board
- Approvals
- Award Notifications

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 ▴	☐
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Pending		☐

[Back to Results](#) 7 of 40 Results ▾ < >

RFB 17 Test 002
005-RFB-0240-2023

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

Settings and Content >

Vendor Responses >

Tools ▾

- Internal Notes
- Exports and Imports**
- Q & A Board
- Approvals
- Award Notifications

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 ▴	☐
Validate	Vendors		Laura Shannon	12/19/2022 1:18 PM	Completed	manuallyInviteSuppliersTemplate (4).xls	☐

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

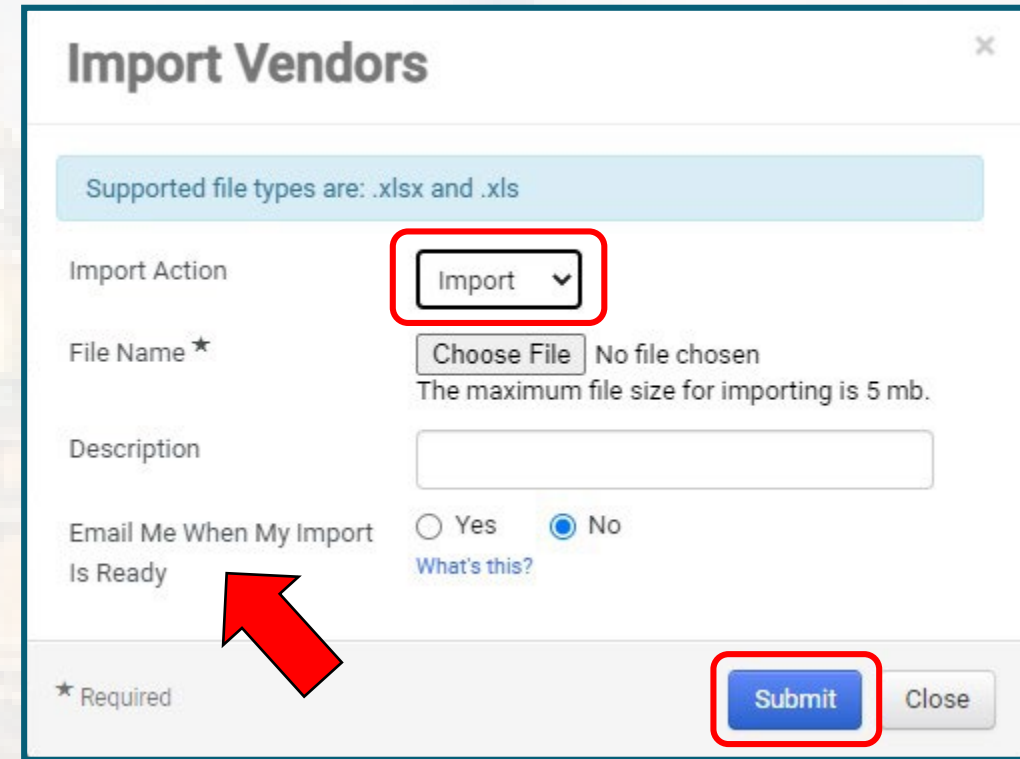
For **Import Action**, Select **Import**.

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

Refresh the page often.

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

Click **Submit**.



The screenshot shows the 'Import Vendors' form with several annotations. A red box highlights the 'Import' dropdown menu in the 'Import Action' field. Another red box highlights the 'Submit' button at the bottom right. A red arrow points to the 'Email Me When My Import Is Ready' checkbox, which is currently unchecked. The form includes a 'File Name' field with a 'Choose File' button and a note that the maximum file size is 5 mb. There is also a 'Description' text area and radio buttons for 'Yes' and 'No' under the 'Email Me When My Import Is Ready' section. A 'What's this?' link is present next to the 'No' option. A 'Close' button is located next to the 'Submit' button. A legend at the bottom left indicates that a star symbol denotes a required field.

Import Vendors

Supported file types are: .xlsx and .xls

Import Action: Import

File Name [★]: Choose File 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

Submit Close

Add Vendors to Event – Manually Import

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

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

Save Progress or Next.

Vendors

Event Actions ▾History ?

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

1 Event Vendors

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

◀ Previous

Save Progress

Next ▶

Review and Submit

Errors and Approval

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

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

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

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

Review and Submit Event Actions History ?

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

⚠ Please complete all required sections to submit this event.

Section	Progress	Action Needed on the Following
Setup	⚠ Incomplete	⚠ Q&A Submission Close Date ⚠ Open Date ⚠ Close Date
Users	✓ Required Fields Complete	
Description	✓ Required Fields Complete	
Prerequisites	3 No Required Data	
Buyer Attachments	8 No Required Data	
Vendor Attachments	✓ No Required Data	
Questions	39 No Required Data	
Items	0 No Required Data	
Vendors	2 Required Data Provided	

[View Approval Steps](#)

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

Review and Submit Event Actions History ?

3 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	3 No Required Data
Buyer Attachments	8 No Required Data
Vendor Attachments	✓ No Required Data
Questions	39 No Required Data
Items	0 No Required Data
Vendors	2 Required Data Provided

[View Approval Steps](#)

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



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

 **Event Submitted for Approval**

Next Steps

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

[Return to My Event](#)

[Add Another Event](#)

[Go to My Home Page](#)

[Go to Sourcing Dashboard](#)

> View Approval Steps

Event Summary

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

Return to Event

To check the approval, Navigate to **Tools>Approvals** to see if the approval workflow has been completed. You may need to click on the **Workflow Actions** button to Approve

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

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

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

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

Settings and Content >

Tools ▾

Internal Notes

Exports and Imports

Q & A Board

Approvals

Approvals

Solicitation Approval Workflow Solicitation Evaluation Workflow

Show skipped steps ☐

Orientation: Horizontal ▾

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

Workflow Actions ▾

- Cancel Event
- Return to Draft

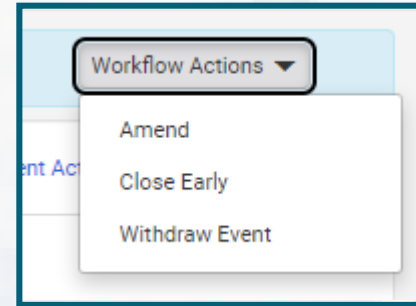
Approve may be a selection in the Workflow Actions section, depending on the Agency approval workflow. **Click to Approve.**

Workflow and Event Actions

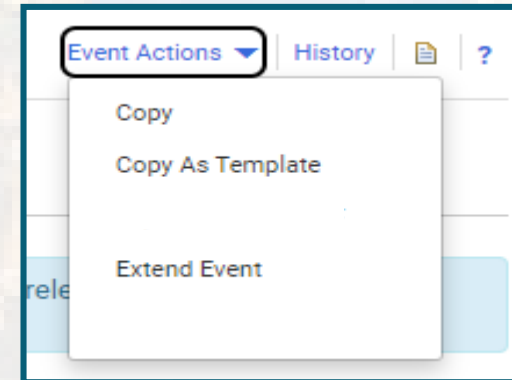
Amend, Extend, Cancel

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

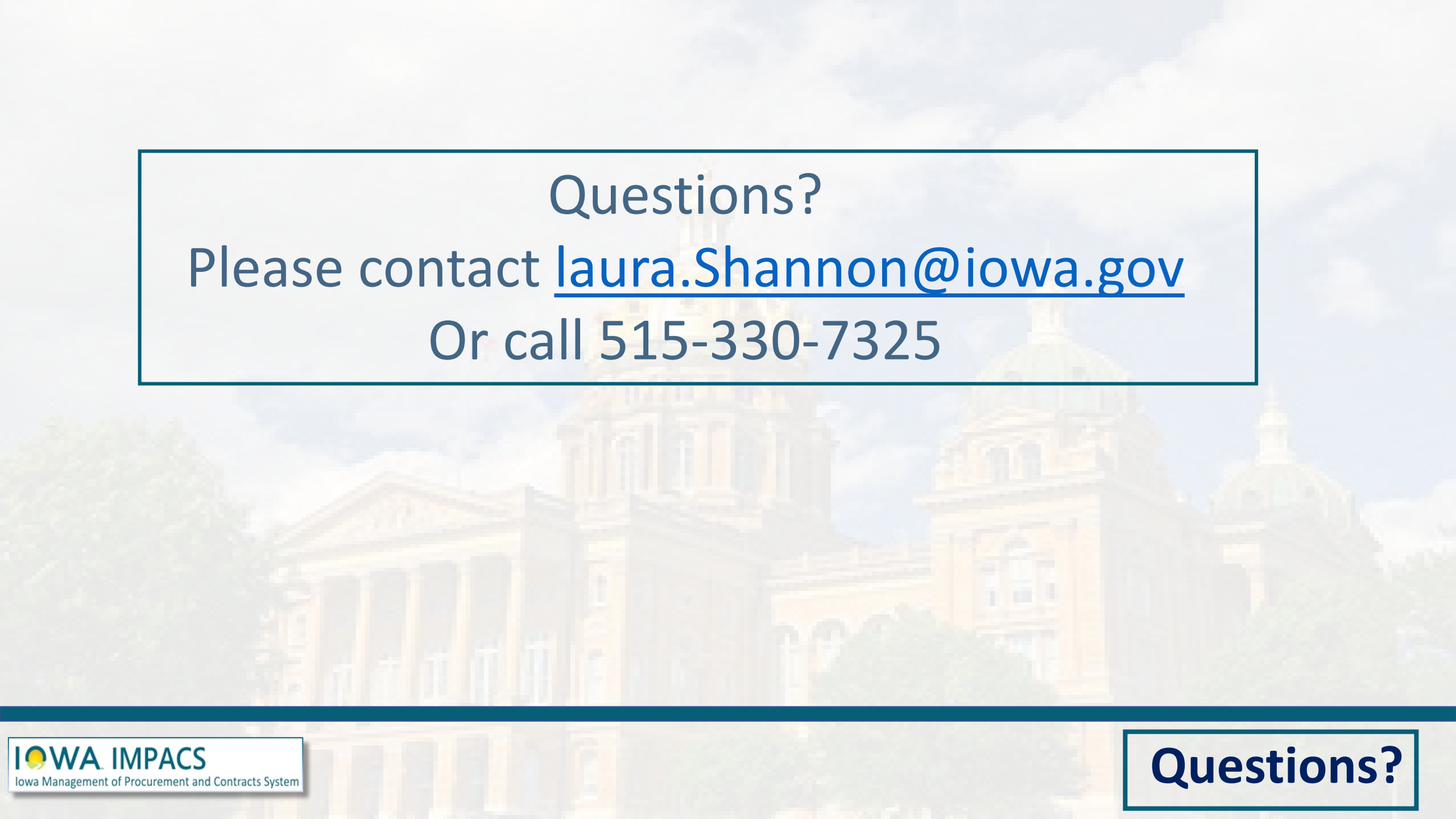
The **Workflow Actions** dropdown in the upper right corner has the following options: **Amend the Solicitation, Close the Solicitation Early, and Withdraw the Solicitation**



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



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



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