Table of Contents

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Sign into Okta and locate the Jaggaer stickers
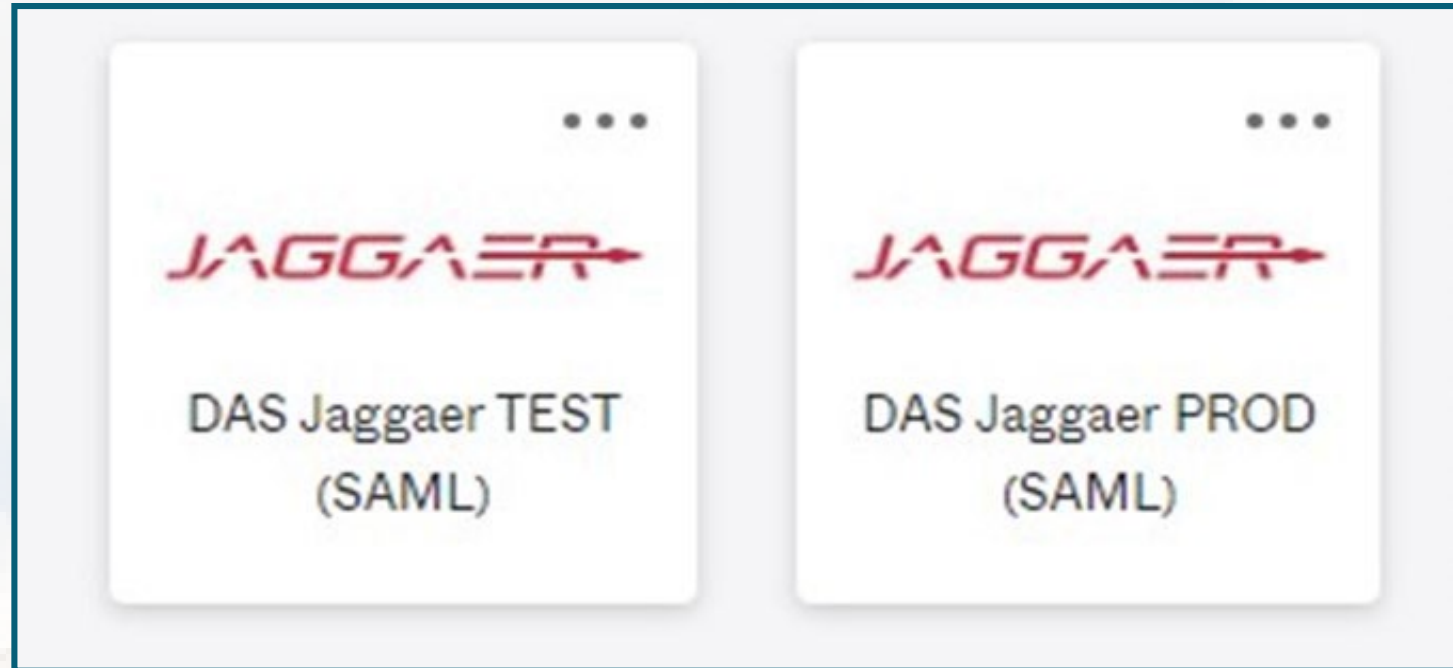
Best practice: Create a Contract in the IMPACS (Jaggaer) TEST UIT environment before posting in the Production (PROD) live site.

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Log In

Contracts Dashboard

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

Menu

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

Home
Shop
Orders
Contracts
Accounts Payable
Vendors
Sourcing
Reporting
Administer
Setup
Menu Search
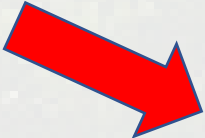
Dashboards · Shop Dashboard - LS

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

Shop

Simple   Advanced   Go to: Favorites | Forms | Non-Catalog Item | Service Item | Quick Order   Browse: Vendors | Categories | Contracts

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

Showcases

PunchOut Catalogs

amazonbusiness   B&H   CDWG   DELL

FASTENAL   NAPA   GRAINGER   GraybaR

My Draft Carts

Showing Results 1 - 4 of 4

NUMBER   CART   CART TYPE   DATE ↓   TOTAL

3663824   2022-12-05 laura.shannon@iowa.gov 01   My Drafts   12/5/2022   2,674.81 USD

3647507   2022-11-08 laura.shannon@iowa.gov 01   My Drafts   11/8/2022   19,456.64 USD

3647535   Copy of RFB 17 Test 001   My Drafts   11/8/2022   1,595.00 USD

Powered by JAGGAER | Privacy Policy

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Left Menu Icons

Open the Contract Dashboard or the Contracts tab on the Main Menu. From either selection, the Buyer may search for Contracts, or create a new Contract.

By copying the dashboard, you may customize the dashboard any way you like. Add and move widgets, change banner colors, and choose the widget filters. Go to your profile to set the new dashboard as your home page.

Contracts Dashboard

Create New Contract

Open the **Contract Menu**. Select the Contract Sub-menu and **Create New Contract**. You may also select the quick link on the dashboard

Create New Contract

The Create Contract pop-up opens.

Name the Contract.

Select the Contract type by clicking the magnifying glass icon.

Create Contract

About the Contract (Step 1 of 1)

Contract Name *

Contract Type *   Type to filter...

* Required   Create Contract

Select the appropriate contract type. Some Agencies will have contract types assigned to them. Look for the Agency number and Acronym preceding the Contract Type.

Create Contract

About the Contract *(Step 1 of 1)*

Contract Name *
Test Contract 015

Contract Type *
In: 625 IDR - 28E Agreement

625 IDR - Memorandum of Understanding (MOU)
In: 625 IDR - Memorandum of Understanding (MOU)

625 IDR - Standard Contract
In: 625 IDR - Standard Contract

Standard Contract (All Agencies except DAS)
In: Standard Contract (All Agencies except DAS)

* Required

Create Contract

AS Master Agreement - Standard
AS Master Agreement - Standard

IOWA IMPACS
Iowa Management of Procurement and Contracts System

The correct contract template will automatically populate the **Contract Template** field.

Please contact laura.shannon@iowa.gov if you would like a custom template.

Next, click the search (magnifying glass) icon to choose your department if using a generic contract type and template. This field automatically populates for agency-specific templates.

Create Contract ×

About the Contract *(Step 1 of 1)* ?

Contract Name *
Test Contract 015

Contract Type *
Standard Contract (All Agencies except DAS) ×

Use Contract Template
● Yes   ○ No

Contract Template *
Standard Contract Template (All Agencies except DAS) ×

Department *
Type to filter...

* Required

Create Contract

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

Select the arrow next to the appropriate Department tree.

Departments

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

Selected Value

No Value Selected

Save Changes   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Select the Department

There are three sections of the department tree:

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

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

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

Departments (first panel)

- ◯ 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 (second panel)

- ◯ 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 (third panel)

- ◯ 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

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Select the Department

When done, click **Create Contract**.

Create Contract ✕

About the Contract *(Step 1 of 1)* ?

Contract Name *   Test Contract 015

Contract Type *   Standard Contract (All ✕ 🔍
Agencies except DAS)

Use Contract Template   ⦿ Yes   ◯ No

Contract Template *   Standard Contract ✕ 🔍
Template (All Agencies
except DAS)

Department *   Corrections - DOC ✕ 🔍

* Required   **Create Contract**

Note the banner at the top. When returning to edit the contract after it has been approved, the contract manager must **Check Out** the contract. Be sure to check it back in when finished. When the contract is checked in- the banner is green.

Following the wizard on the left-hand side of the screen, IMPACS will walk the contract manager through contract creation.

Contract Wizard

The contract status is located at the top left of the screen.

The Contract Actions button at the top right lists some additional actions. If you make a mistake, you can delete the contract and start over (as long as the contract has not been approved).

Once the contract has been **approved** and the changes are major (using a different template, for instance), IMPACS will not allow a contract number to be reused. Please place a period ". "behind the number if you reuse it.

Contract Wizard

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Contracts Wizard

Contract Header

Under the **Contract Header** section, the auto-generated contract number may be changed by selecting the pencil icon. Agencies may have a specific number wheel.

Check that the **Contract Name**, **Type** and **Department** are correct.

Click the Edit Summary button. The Contract Summary window opens.

Enter information about the contract's general purpose, and any helpful information for the end user. The summary is prominent on the contract display page for the end user and will be the primary place where to find information about the contract.

Note the formatting options –text size and color, pictures, hyperlinks, may be changed or added.

Click **Done** when finished.

Contract Header - Summary

The **First Party** is the Agency creating the contract. To change the Agency, delete the Agency listed by selecting the trashcan icon.

Click **Add First Party** to change the Agency. Select the search icon, and select your Agency by expanding the Department tree. Then click **Select Contract Party.**

Contract Parties

Once you select your Agency, you will be prompted to add the Contract Manager's contact information. If you are not listed, create a new contact by clicking **Add Contact** and filling in your information. Click Next and choose your address or create one.

Contract Parties

The **Second Party** is the Vendor. To select the Vendor, click the **Add Second Party** button.

After clicking the information icon ⓘ check to see that the vendor is In-Network which is indicated by this icon: 👥

The Vendor *may* also have their I/3 vendor number listed to indicate this is the correct vendor to use. If in doubt, reach out to purchasing.mailbox@iowa.gov

Select Primary Second Party

Search for Contract Party *(Step 1 of 3)*

HP [🔍] More Options

Contract Party Name ▽	Contract Party Types	Primary Address ▽
⦿ HP Inc ⓘ	Vendor	– View Additional Addresses
○ Hewlett Packard Financia ⓘ	Vendor	–

Select Contract Party   Close

Vendor Details   ↻ ?

👥 In Network   **HP Inc**
✓ Active   Legal Name   HP Inc
☐ Non-Catalog ❓   DBA   HP Inc
                       Aliases   –
                       Vendor No.   00002145540
                       3rd Party Ref No. –
                       Date of Last Order –
                       Diversity   –
                       Registration Status None

If you need to edit the contact information, select the pencil icon **NOTE:** Once the contract is approved, you will not be able to change the Contract Parties or Department by editing the contract. **Amending** the contract is the only way to change the parties. Changing the contact information will not require an amendment.

Contract Parties

Add First Party | Add Second Party

Name	Currently Visible	Type	Contact	Contract Address		
Department of Administrative Services - CP		Agency (Primary)	Betty Buyer	1305 East Walnut St. Level 3 Des Moines, Iowa, 50319 US	✏️	🗑️
HP Inc	✖	Vendor (Primary) ⓘ	Aaron Bennis	14231 TANDEM BLVD AUSTIN, TX, 78728-6612	✏️	🗑️

The next section of the header page is **Dates and Renewal**.

Enter the contract's **Start Date** and **End Date.** Select the **Renewals Remaining** and the **Renewal Term.** Leave **Auto-Renew** set to **"No"**. Expand the **Additional Details Section** and add additional contract details (if needed).

Searchable Keywords are very important. Please identify the appropriate keywords for this contract, separated by a comma.

Dates and Renewal

Time Zone ★   CDT/CST - Central Standard Time (US/Cent ⌄

Start Date ★   [   ] 🗓
                      mm/dd/yyyy hh:mm a
                      ☐ Update Start Date Upon Execution ❓

End Date ★   [   ] 🗓
                      mm/dd/yyyy hh:mm a

Renewals Remaining   [   ]
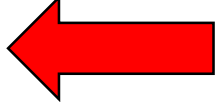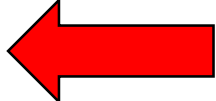
Renewal Term   [   ] [⌄]

Auto-Renew   ○ Yes ◉ No

⌄ **Additional Details**

Details   [   ]
                      2000 characters remaining

Searchable Keywords   [   ]
                      2500 characters remaining

Contracts Wizard

Contract Information

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

The next section is **Contract Information**. Depending on whether you are using a cooperative contract template, standard contract template, or single agency template, you will see different fields in this section.

In the contract **Applies To** selection box, choose the Agency the contract applies to. If the contract is a master agreement, then the contract likely applies to "All State Agencies, Governmental Entities & Political Subdivisions".

Contract Information

Contract Applies To ★ ❶ [Type to filter... 🔍]

Contract Websites

[ ]

2000 characters remaining

Renewals Remaining ❶ [ ] ▲▼

❶ Field Validation

Contract Applies To ✕

[🔍]

◀ ▶ Page 1 of 11   1-10 of 103 Results   10 Per Page ▼

Name

AEA Purchasing   Select

Administrative Services, Department of   Select

Agriculture and Land Stewardship   Select

All State Agencies   Select

All State Agencies, Governmental Entities & Political Subdivisions   Select

Anamosa-Farm Accounts   Select

Attorney General   Select

Auditor of State   Select

Board of Parole   Select

Board of Regents   Select

◀ ▶ Page 1 of 11   1-10 of 103 Results   10 Per Page ▼

Selected Value

No Value Selected

Close

Contract Information

If there is a website for the contract – for instance, a Cooperative website that references contract information, post the link here or enter "NONE" in the field.

Enter the Renewals remaining (again) so that the Main Signing Document shows the correct information.

Contract Information

Contract Applies To ★ 🛈   Type to filter... 🔍

Contract Websites

2000 characters remaining

Renewals Remaining 🛈

🛈 Field Validation

Contracts Wizard

Terms and Conditions

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

Under the **Terms & Conditions Section**, click the **Primary Terms and Conditions** drop-down menu and select the appropriate Terms and Conditions.

Click the **Additional Terms and Conditions** dropdown menu to add more terms and conditions. If there are no additional Terms and Conditions, then select **"Intentionally Left Blank".** The field cannot be left unfilled.

Single Agency templates may be structured differently.

Terms and Conditions

Primary Terms and Conditions ★ ⓘ

Additional Terms and Conditions ⓘ

Terms and Conditions Website(s) ⓘ

2000 characters remaining

Payment Terms ★ ⓘ

Shipping Terms - Free on Board ★ ⓘ

General Terms and Conditions for Goods
General Terms and Conditions for Services
General Terms for Goods and Services
Design and Construction Resources - Consensus Doc 802
Design and Construction Resources - Consensus Doc 803
Other - See Attached

Federal Terms and Conditions
Information Technology Terms and Conditions
IT -as-a-Service (SaaS, IaaS, PaaS) Terms and Conditions
Iowa HSEMD Terms & Conditions
Iowa DHHS Terms and Conditions
Iowa Department of Transportation Terms and Conditions
Design and Construction Resources - Consensus Doc 802
Design and Construction Resources - Consensus Doc 803
Intentionally Left Blank
Other - See Attachment

Terms & Conditions

Reference the website link for the Terms and Conditions you selected in the previous drop-down menus. Use the most recent updated link – for instance:

https://das.iowa.gov/sites/default/files/procurement/pdf/050116%20terms%20goods.pdf

Many of the terms can be found at: https://das.iowa.gov/procurement/terms-and-conditions

Terms and Conditions

Primary Terms and Conditions * ℹ

Additional Terms and Conditions ℹ

Terms and Conditions Website(s) ℹ

2000 characters remaining

Payment Terms * ℹ

Shipping Terms - Free on Board * ℹ

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Terms & Conditions

Select the appropriate **Payment Terms** from the drop-down box. Standard terms are 0% 0, Net 60.

Select the appropriate **Shipping Terms** from the drop-down box.

Terms and Conditions

Primary Terms and Conditions * ⓘ

Additional Terms and Conditions ⓘ

Terms and Conditions Website(s) ⓘ

2000 characters remaining

0% 0, Net 10
0% 0 Net 15
0% 0, Net 30
0% 0, Net 45
0% 0, Net 60
1% 10, Net 60
1% 15, Net 60
2% 30, Net 60

Payment Terms * ⓘ

Shipping Terms - Free on Board * ⓘ

FOB Destination, Freight Prepaid
FOB Origin
FOB - Other
Not Applicable

Terms & Conditions

Contracts Wizard

Goods and/or Services

IOWA IMPACS
Iowa Management of Procurement and Contracts System

The next section is **Goods and/or Services.** This is where you will list the items of the contract in a table format. Click **Add New Item.**

240051837
Test Contract 015

Type: 005 DAS Single Agency
         Contract
2nd Party:
Version: Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header   ⚠

Goods and/or Services   ✔

Commodity Codes   ⚠

Alternative Language   0

Attachments   1

Obligations   0

Review Rounds   0

Submit for Approval

Comments   0

Communication Center   0

Users and Contacts

Notifications

Contract Family

Goods and/or Services

▼ Goods and/or Services (0)

Add New Item

This table is currently empty.   View Table Columns

Goods and Services

Add the Item Description, Quantity, Units of Measure, Unit Price, and any Notes about the item.

You may save this item and add another, or save changes and stop adding.

Add Goods and/or Services Details ✕

Item Description *

Quantity

UOM *

Unit Price *   USD

Notes

2000 characters remaining

Display Order   Last ▾

* Required   Save and Add Another   Save Changes   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Goods and Services

Here is an example of a completed Goods and/or Services section. You may select the **Actions** button to Edit the line item or remove the line item.

Goods and/or Services Summary   View XML | History | ?

Goods and/or Services (10)

Item Description ★	Quantity	UOM ★	Unit Price ★	Notes	
Project Package per location	1	each	5,000.00 USD	per location	Actions ▼
Shipping per Tower	1	each	2,700.00 USD	shipping per tower	Actions ▼
1 Tower System	1	each	145,000.00 USD		Actions ▼
2 Tower System	1	each	290,000.00 USD		Actions ▼
3 Tower System	1	each	435,000.00 USD		Actions ▼
4 Tower System	1	each	580,000.00 USD		Actions ▼
Monthly Subscription per tower	1	each	1,200.00 USD	Monthly Service and maintenance per tower	Actions ▼
Unit Dose Printing per tower	1	each	15,000.00 USD		Actions ▼
Monthly Subscription Unit Dose Printing	1	each	200.00 USD	Unit Dose Printer per tower	Actions ▼
Monthly Subscription Printing per location	1	each	250.00 USD	Advanced Printing, Pre-pack Manager, Time Pass Printing is $250 each add-on option	Actions ▼

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Goods and Services

Contracts Wizard

Commodity Codes

The next Section in the Wizard is Commodity Codes. Add one or more Commodity Codes that apply to the contract.

Click **Add Codes**.

240051837
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

Goods and/or Services ✔

Commodity Codes ⚠

Alternative Language 0

Commodity Codes

A commodity code is required.

Add Codes

There are no commodity codes associated with this contract.

If you do not know the Commodity Code, use the search box at the top of the Commodity Codes Menu that pops up when the Add Code button is selected.

It might be easier to search using Control F on the IMPACS Commodity Codes document. You can find it here under **IMPACS Resources**:
https://das.iowa.gov/iowa-management-procurement-and-contracts-system-impacs

Commodity Codes

Laptop

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

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

Close

Commodity Codes

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

Select the Commodity Code and add as many codes that apply to the Contract. More is better.

Save Changes when done.

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

Contracts Wizard

Attachments

The next Section in the Wizard is **Alternative Language**. Skip that section and go to the next section: **Attachments**.

In this section, you may add the relevant and mandatory documents each contract must have per State of Iowa procurement rules. You may also add **Internal Only** documents that can be seen only by Contract Managers and Administrators.

Obligations will be covered in another section.

Attachments

IMPACS generates a populated signing document – called the **Main Document** based on the information you entered in the Header. You may download this document, edit it (as needed), and send it for signature.

Any documents you want to be included with the Main Document can be added to the Main Document by ensuring **"Print with Full Contract"** is checked.
For example: Special Terms and Conditions not listed in the Terms and Conditions website field.

IMPACS generates a populated Master Agreement (MA) document based on the information entered in the Header. You may download this document, edit it (as needed), and send it for signature. The example at the right is pages 1-3 of a master agreement signing document.

Single Agency main documents may be different and can be customized including adding the Agency Logo.

Attachments

You may attach documents or a link to a website.

Drag and drop an unlimited number of files at a time. Individual file size is limited to 50MB. Or click the **Select files** button to open your file explorer and select your files from there.

Best practice: Select "No" for Print with full contract if uploading many attachments. Chances are that you are only printing the Main Document, any special terms, SOW, or a price sheet as one contract document – not the supporting documents (RFx, NOIA, etc.)

Show on Vendor Portal allows the vendor to see the attachments from their portal.

240051837
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

Goods and/or Services ✔

Commodity Codes ⚠

Alternative Language ⓪

Attachments ①

Attachments   View XML | History | ?

General (1)   Internal Only (0)   Obligations (0)

[Add Attachments ▼]   👑 Main Document

Print Order ▲	Attachment ▲	Print with Full Contract ▲	Show on Vendor Portal ▲	Version ▲	Size ▲	Date Uploaded ▲	
1 👑	⬇ Contract Main Document DAS Contract Main Document.docx	✔	✔	1	33 KB	2/8/2024 2:25:51 PM	Actions ▼

Add Attachments ✕

Attachment Type	◉ Add My Own ○ Link ○ Create a Blank Word Document for Me

You can drag and drop multiple files into the gray box below. They will be attached in the order they appear.

Files ★	[Select files...] *Drop files to attach, or browse.*

Maximum upload file size: 50.0 MB

Print Order	[Last ▼]
Print with Full Contract	◉ Yes ○ No
Show on Vendor Portal	○ Yes ◉ No
Contract Summary Visibility	[Use the Summary Configuration Settings ▼]

★ Required   [Save Changes] [Close]

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Attachments

When inputting an **existing signed contract** for the first time, change the Main Document to the signed version.

Once you have uploaded the signed contract, click the **Actions** button and Replace as the Main Document". The crown icon indicates that the document is the Main Document 👑

Always check **Print with Full Contract** and **Show on Vendor Portal** for the signed contract.

IMPORTANT: do not delete or generate a new version of the IMPACS-generated document. You will need it for the contract renewal.

Edit Properties
Download
Upload New Version
Replace as Main Document
Delete
Move to Internal Only Attachments

Edit Properties
Download
Upload New Version
Generate New Version
Unassign as Main Document
Delete

Add Attachments ▼

👑 Main Document

Print Order ▲	Attachment △	Print with Full Contract △	Show on Vendor Portal △	Version △	Size △	Date Uploaded △	
1 👑	⬇ Contract Main Document DAS Contract Main Document.docx	✔	✔	1	33 KB	2/8/2024 2:25:51 PM	Actions ▼
2	⬇ Special Terms and Conditions.pdf	✔	✔	1	33 KB	2/8/2024 3:53:46 PM	Actions ▼
3	⬇ Price List.pdf	✔	✔	1	78 KB	2/8/2024 3:53:46 PM	Actions ▼

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Attachments

There are many actions available under the **Actions** button:

Replace the Main Document with a different attachment in the list. The File will move to the top of the list and the crown icon will be next to the file name.

Generate a new version of the document (and keep all previous versions) of the document.
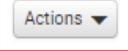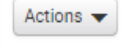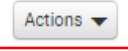
Move an attachment to the internal-only tab. The file will only be available to the Contract Managers and Administrators in your Department.

Edit Properties
Download
Upload New Version
Replace as Main Document
Delete
Move to Internal Only Attachments

Edit Properties
Download
Upload New Version
Generate New Version
Unassign as Main Document
Delete

Add Attachments ▼

♛ Main Document

Print Order ▲	Attachment △	Print with Full Contract △	Show on Vendor Portal △	Version △	Size △	Date Uploaded △	
1 ♛	⬇ Contract Main Document DAS Contract Main Document.docx	✔	✔	1	33 KB	2/8/2024 2:25:51 PM	Actions ▼
2	⬇ Special Terms and Conditions.pdf	✔	✔	1	33 KB	2/8/2024 3:53:46 PM	Actions ▼
3	⬇ Price List.pdf	✔	✔	1	78 KB	2/8/2024 3:53:46 PM	Actions ▼

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Attachments

Edit Main Document Properties ✕

Attachment	⬇ Attachment
Name ★	Contract Main Document
Print Order	First ▾
	First
	Last
Print with Full Contract	After "Special Terms and Conditions.pdf"
	After "Price List.pdf"
Show on Vendor Portal	Use the Summary Configuration Settings
Contract Summary Visibility	

★ Required   [Save Changes] [Close]

Edit Properties

Download

Upload New Version

Generate New Version

Unassign as Main Document

Delete

Actions button continued: Under the **Edit Properties** selection, you may reorder attachments and change the "Print with Full Contract" and "Show on Vendor Portal" settings.

[Add Attachments ▾]

♛ Main Document

Print Order ▲	Attachment △	Print with Full Contract △	Show on Vendor Portal △	Version △	Size △	Date Uploaded △	
1 ♛	⬇ Contract Main Document DAS Contract Main Document.docx	✔	✔	1	33 KB	2/8/2024 2:25:51 PM	[Actions ▾]
2	⬇ Special Terms and Conditions.pdf	✔	✔	1	33 KB	2/8/2024 3:53:46 PM	[Actions ▾]
3	⬇ Price List.pdf	✔	✔	1	78 KB	2/8/2024 3:53:46 PM	[Actions ▾]

Contracts Wizard

Obligations

The next section is Obligations. The IMPACS system sets up reoccurring reminders to the Contract Manager and the Vendor for: Certificates of Insurance, reports, fees, dues, license requirements or anything that occurs on a regular basis.

Click **Add Obligation** and select **Add Obligation from Library,** or create your Obligation from scratch.

40020
Test Contract 074

Type:	Master Agreement - Standard - Test
2nd Party:	SOIJAGGAERTEST
Dates:	4/1/2023 - 3/31/2024
Version:	Renewal 0, Amendment 0

> Lifetime Spend (USD)

Open Main Document ▼

Summary

Header ✔

   Commodity Codes ✔

Alternative Language ⓪

Attachments ①

Obligations ⓪

Obligations ⓘ

View XML History 📄 ?

Add Obligation ▼

Show Recurring Obligations As   Occurrences ▼

Due Date Between

mm/dd/yyyy hh:mm a   mm/dd/yyyy hh:mm a

More Options

Clear   🔍 Search

🔄 Occurrence in a Series

No results found

Add Obligation ▼

Add New Obligation

Add Obligation from Library

Add Obligation from Library

Choose Obligation Step 1 of 3

Obligation ＊   Obligation 🔍

＊ Required   Next   Close

Select Values   ×

🔍

Name

28E - Reporting to the SOS   Select
625 IDR - Annual Security Training & Acknowledgement   Select
Quarterly Sales Report   Select
Administration Fee   Select
Insurance Certificate Renewal (COI)   Select

Selected Value

No Value Selected

Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Obligations

After selecting the COI obligation, a pop-up menu appears.

The description is self-populated, but you may edit it. Depending on the obligation, you may choose if documentation is required.

Add Obligation from Library

Properties Step 2 of 3

Name *
Insurance Certificate Renewal (COI)

Description *
Annual review of Liability Insurance Certificate (COI)

202 characters remaining

Tags
coi ✕

Options
☑ Documentation Is Required
☐ Prompt to Create Invoice When Marked as Complete

Frequency *
Recurring

Repeats Every *
1 | Years

in | January

on | Day | 1

Start *
On Custom Date

mm/dd/yyyy

End *
By Custom Date

mm/dd/yyyy

Due *
11:59 PM

hh:mm a

Time Zone *
☑ Same as Contract (CST)

* Required

Previous | Next | Close

Determine the term of the COI and enter the month and day that the COI renews in the **"Repeats Every"** field.

The Start Date should be a future date—either the start of the contract or a date closer to when the obligation is due.

There are more options in the drop-down box.

Add Obligation from Library

Properties Step 2 of 3

Name *	Insurance Certificate Renewal (COI)

Description *
Annual review of Liability Insurance Certificate (COI)

202 characters remaining

Tags — coi ✕

Options — ☑ Documentation Is Required
☐ Prompt to Create Invoice When Marked as Complete

Frequency * — Recurring

Repeats Every * — 1 ▲▼ Years ▾

in — January ▾

on — Day ▾ 1 ▲▼ ⓘ

Start * — On Custom Date ▾

[____] 📅
mm/dd/yyyy

End * — By Custom Date ▾

[____] 📅
mm/dd/yyyy

Due * — 11:59 PM 🕐
hh:mm a

Time Zone * — ☑ Same as Contract (CST)

* Required   Previous   **Next**   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Obligations

The End Date - there are multiple selections in the drop-down box that may be used. You may want to account for the contract renewals when determining the end date. When done, click **Next.**

Add Obligation from Library

Properties Step 2 of 3

Name *	Insurance Certificate Renewal (COI)
Description *	Annual review of Liability Insurance Certificate (COI)
	202 characters remaining
Tags	coi ✕ 🔍
Options	☑ Documentation Is Required
	☐ Prompt to Create Invoice When Marked as Complete
Frequency *	Recurring
Repeats Every *	1 ▲▼ Years ⌄
	in January ⌄
	on Day ⌄ 1 ▲▼ ⓘ
Start *	On Custom Date ⌄
	[ ] 📅
	mm/dd/yyyy
End *	By Custom Date ⌄
	[ ] 🗓
	mm/dd/yyyy
Due *	11:59 PM 🕐
	hh:mm a
Time Zone *	☑ Same as Contract (CST)

* Required   Previous   **Next**   Close

The next screen allows you to add Owners and Stakeholders to receive email reminders that the Obligation is coming due.

The First Party Owner, (the Contract Manager) is automatically added.

Click on the "**Add New"** button to add the Vendor contact to receive the reminders.

Add Obligation from Library

×
Cl

Owners and Stakeholders Step 3 of 3

Add New

Role ▲	Person ▽	Task/Notes	Send Notifications	
First Party Owner	Contract Manager	Review COI	Advance Notice, Due Date, Past Due Notice, Completed	Actions ▲

Advance Notice Settings

Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
45 ▲▼	30 ▲▼	15 ▲▼

★ Required

Previous   **Save Changes**   Close

Add Owner or Stakeholder

Role ★	First Party Owner ⌄
	First Party Owner
	First Party Stakeholder
	Second Party Stakeholder
Person ★	
Task/Notes	
	1000 characters remaining
Send Notifications	☑ Advance Notice
	☑ Due Date
	☑ Past Due Notice
	☑ Completed

★ Required   Save   Save and Add Another   Close

The Add Owner or Stakeholder pop-up screen appears.

Change the Role to **Second Party Stakeholder**.

Click the search icon to find the Vendor's contact name.

Add Owner or Stakeholder

Role ★	Second Party Stakeholder ⌄
Second Party Contact ★	Name, Email 🔍
Task/Notes	
	1000 characters remaining
Send Notifications	☑ Advance Notice
	☑ Due Date
	☑ Past Due Notice
	☐ Completed

★ Required   Save   Save and Add Another   Close

I⊙WA IMPACS
Iowa Management of Procurement and Contracts System

Obligations

The **Second Party Search** pop-up screen appears.

Select the second-party stakeholder contact from whom you would like to receive the obligation notifications.

In this example - one of these contacts.

Second Party Search

Name	
JAGGAERTEST, SOI (Primary Corporate)	Select
owner (Sales)	Select
JAGGAERTEST, SOI (Sales)	Select

Selected Value

No Value Selected

Close

Once you select the Second Party Stakeholder contact, you are redirected to the **Add Owner or Stakeholder** screen.

Add email language for the vendor in the Task/Notes box. Modify the sample language in the far right box to fit your requirements.

You may select which notifications the Vendor will receive here.

Click **Save** or **Save Add Another**.

Add Owner or Stakeholder   ✕

Role *   Second Party Stakeholder ⌄

Second Party Contact *   JAGGAERTEST, SOI   ✕   🔍
                          (Primary Corporate)

Task/Notes   [   ]

                          1000 characters remaining

Send Notifications   ☑ Advance Notice
                          ☑ Due Date
                          ☑ Past Due Notice
                          ☐ Completed

* Required   [Save] [Save and Add Another]   [Close]

You are receiving this notice for review of your liability insurance for one of the following two reasons:
(1) Your Certificate of Insurance has expired and your immediate attention is required, or
(2) Your Certificate of Insurance will expire in 30 days or less and will need to be renewed.

Send the Certificate of Insurance (COI) to the State of Iowa Contract Manager.
Please include in the COI the following additions:

COI - Description of Operations box shall state: State of Iowa and the Iowa Department of Administrative Services are named as additional insured. No insurance cancellation shall be made without at least thirty (30) days prior written notice to the State of Iowa and the Iowa Department of Administrative Services.

COI - The Certificate Holder box shall state: State of Iowa - Department of Administrative Services
1305 East Walnut Street
Des Moines, IA 50319

Obligations

You are redirected back to the **Add Obligations from Library Screen.**

Select the number of days in advance the Vendor will receive the notifications.

Select the days that work best for you, then click **Save Changes**.

Add Obligation from Library

Owners and Stakeholders Step 3 of 3

Add New

Role ▲	Person ▽	Task/Notes	Send Notifications	
First Party Owner	Contract Manager	Review COI	Advance Notice, Due Date, Past Due Notice, Completed	Actions ▲
Second Party Stakeholder	JAGGAERTEST, SOI (Primary Corporate)	–	Advance Notice, Due Date, Past Due Notice	Actions ▲

Advance Notice Settings

Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
45	30	15

★ Required

Previous   Save Changes   Close

You are redirected back to the Obligations Main Screen.

You will now see the Obligation listed. There may be multiple listings of the obligation. These are the **Occurrences** of the Obligation.

40020
Test Contract 074

Type: Master Agreement - Standard - Test
2nd Party: SOIJAGGAERTEST
Dates: 4/1/2023 - 3/31/2024
Version: Renewal 0, Amendment 0
❯ Lifetime Spend (USD)

Open Main Document ▾

Summary
Header   ✔
    Commodity Codes   ✔
Alternative Language   0
Attachments   1
Obligations   1
Review Rounds   0
Submit for Approval

eProcurement Setup
Budget and Spend
Applies To
Goods and Services
PO Clauses

Comments   0

Obligations ⓘ

View XML | History | 📄 | ?

Add Obligation ▾

Show Recurring Obligations As | Occurrences ▾ |

Due Date Between   [   ] 📅🕐   [   ] 📅🕐   More Options
                    mm/dd/yyyy hh:mm a   mm/dd/yyyy hh:mm a

                                             Clear   🔍 Search

                                                    ↻ Occurrence in a Series

1-1 of 1 Results
                                                    ⚙ 200 Per Page ▾

Obligation Name ▽	Obligation Id ▽	Status ▽	Due Date ▽	Complete Date ▽	First Party Owner
Insurance Certificate Renewal (COI) 📎	248168	Future	1/1/2024 11:59 PM CST ↻		– Actions ▾

                                        ‹ Previous   Next ›

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Obligations

A listing of all Obligations can be found under the drop-down box. Select **Series**.

Obligations ⓘ

View XML | History | 📄 | ?

Add Obligation ▾

Show Recurring Obligations As   Series ▾

1-1 of 1 Results   ⚙ 200 Per Page ▾

Obligation Name ▽	Obligation Id ▽	Status ▽	Due Date ▽	Complete Date ▽	First Party Owner	
Insurance Certificate Renewal (COI) 📎	248168	Future	Every 1 year in January on the 1st of the month at 11:59 PM Start on 4/30/2023 CDT (custom) End on 3/31/2024 CDT (contract end) ↻		–	Actions ▾

You may view or edit the Obligation Properties by clicking the **Actions** button. To mark the obligation as complete and upload the COI, click the Actions drop-down box.

Obligations

The Mark as Complete pop-up box appears and you may upload the COI in the Attachments section then select Mark as Complete.

Mark as Complete ⓘ

❌ Cl

Obligation Name	Insurance Certificate Renewal (COI)
Status	**Future**
Due Date	1/1/2024 11:59 PM CST
Completed Date ★	04/13/2023 10:09 AM 📅 🕐
	mm/dd/yyyy hh:mm a
Notes	
	700 characters remaining
Attachments ★	Select files... *Drop files to attach, or browse.*
	Maximum upload file size: 50.0 MB

★ Required   **Mark as Complete**   Close

Once **Marked as Complete**, the Obligation status will change to **Complete**.

The document (COI) is located in the **Attachments** tab in the Wizard under Obligations.

Contracts Wizard

Review Rounds (Optional)

The next Section in the Wizard is **Review Rounds**. Send the contract for internal and external review for redlines and comments. (Optional)

Agencies can default a person(s) to always be sent the contract for review before approval.

Clicking the Create Manual Internal Round button opens the **Add Reviewer** Pop-up screen. Search for the reviewer in the Search bar, then click the select button next to the name.

40020
Test Contract 074

Type:	Master Agreement - Standard - Test
2nd Party:	SOIJAGGAERTEST
Dates:	4/1/2023 - 3/31/2024
Version:	Renewal 0, Amendment 0

> Lifetime Spend (USD)

Open Main Document ▾

Summary

Header ✔

Commodity Codes ✔

Alternative Language 0

Attachments 1

Obligations 1

Review Rounds 0

Review Rounds

This contract has 0 completed rounds of review.

Create Manual Internal Round   Create External Round

Add Reviewer ✕

[🔍]   More Options

< >   Page 1 of 88   1-10 of 871 Results   10 Per Page ▾

Name

Alliss, Justin	Select
Winslow, Amanda	Select
Garland, Shannon	Select
Schulz, Teri	Select
Gustafson, Jean	Select
Polich, Reese	Select
Okland, Jerrod	Select
Hunter, Mallory	Select
Williams, Kyle	Select
Ahsan, Akm	Select

< >   Page 1 of 88   1-10 of 871 Results   10 Per Page ▾

Selected Values

No Values Selected

Save Changes   Close

Click **Begin Round** when ready. Add a message to the reviewer, then click **Begin Internal Review**. The reviewer will receive an email with a link to the contract.

Review Rounds

IOWA IMPACS
Iowa Management of Procurement and Contracts System

The contract can only be edited by the Internal Reviewer.

If the contract manager needs access to the contract for edits and the internal reviewer is unavailable, click the **End Round Now** button. The contract will return to Draft status.

Internal Review You are a reviewer. You can check out the contract to make changes, then finish your review. | Contract Actions ▾

If you would like to edit this contract please check it out. | Check Out

240051845
Test Contract 015

Type: 005 DAS Single Agency Contract
2nd Party:
Version: Renewal 0, Amendment 0

Summary
Header ⚠
    Goods and/or Services ✔
    Commodity Codes ⚠
Alternative Language 0
Attachments 1
Obligations 0
Review Rounds 1

Review Rounds   View XML | History | ?

This contract has 0 completed rounds of review.

Expand All | Collapse All

▾ **Current Round (Internal - Manual)** (2/9/2024 -)   End Round Now

No message exists. Edit

Tracking	Reviewer	Comment	Actions
Sent ⓘ	Shannon, Laura	-	Actions ▾

When the Internal Reviewer has completed the review, they navigate to the Contracts Action button, add their comment in the pop-up screen, and click the **Done with My Review** button.

The Comments will be located in the comment section, and the status will be Marked as **Done**.
The information icon is a time stamp.

The process can be repeated as necessary until the contract is ready for approval

Draft Once done authoring, reviewing, and negotiating this contract, submit it for approval.

Contract Actions ▾

Done with My Review
Check Out

Open Main Document
Download Full Contract as PDF

Copy

Add Internal Message
Start External Communication
View/Reactivate Subscribers
Queue for Export

If you would like to edit this contract please check it out.

240051845
Test Contract 015

Type: 005 DAS Single Agency Contract
2nd Party:
Version: Renewal 0, Amendment 0

Summary

Header ⚠

Goods and/or Services ✓

Commodity Codes ⚠

Alternative Language 0

Attachments 1

Obligations 0

Review Rounds 1

Submit for Approval

Review Rounds

This contract has 1 completed round of review.

Create Manual Internal Round   Create External Round

▾ **Round #1 (Internal - Manual)** (2/9/2024 - 2/9/2024)

No message exists.

Tracking   **Reviewer**

Done ⓘ   Shannon, Laura

Comment

Test comment

Done with My Review ✕

Please enter a review comment for the Contract Manager ★

Test comment

988 characters remaining

★ Required   Done with My Review   Close

Clicking the Create External Round button opens the **Add Reviewer** Pop-up screen. Enter the External reviewer, then click Save.

40020
Test Contract 074

Type: Master Agreement - Standard - Test
2nd Party: SOIJAGGAERTEST
Dates: 4/1/2023 - 3/31/2024
Version: Renewal 0, Amendment 0
> Lifetime Spend (USD)

Open Main Document ▼

Summary
Header ✓
    Commodity Codes ✓
Alternative Language ⓪
Attachments ①
Obligations ①
Review Rounds ⓪

Review Rounds   View XML | History | 📄 | ?

This contract has 0 completed rounds of review.

Create Manual Internal Round   Create External Round

Add Reviewer   ✕

First Name *   [   ]

Last Name *   [   ]

Email *   [   ] ✉

Title   [   ]

Phone Number   [ext. [   ]]
                 International phone numbers must begin with +

★ Required   Save   Close

Review Rounds

The pop-up window opens with an email template pre-populated with placeholders from your contract – contract number, name, and attachment names. You may edit the email and placeholders.

All the uploaded attachments will be available to select in the Attachment Section.

When ready, click Send Email.

Begin Round of External Review

Recipients

Recipients *   ☑ SOI Jaggaertest

Attachments

Indicate which attachments you would like to include in the email.

☑	**Attachment**	**Size**	**Full Contract PDF**
☑	Contract Main Document ♛	33 KB	✔

☐ Include Full Contract PDF ⓘ

Email Content

Customize your email below:

From Name *   Laura Shannon

From Email *   laura.shannon@iowa.gov

Reply To Email *   laura.shannon@iowa.gov

Subject * ${CONTRACT_NAME} ${synonym:contract} has been forwarded to you

ⓘ Right click on placeholders 🖼 to edit or remove them.

Body *

| Format | Size | **B** *I* U̲ S̶ | x₂ x² | A▾ A▾ |
| I× 1≣ :≣ ₋≣ ₊≣ 🔗 🔗 | 🖼 Placeholders |

Dear External Review Participant name 🖼

This email is to inform you that The contract name 🖼 , contract 🖼   The contract number 🖼 , is available for your review. For your convenience the contract 🖼 documentation has been attached to this email.

Contract Link Attachments 🖼

* Required   **Send Email**   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Review Rounds

This is a screenshot of the email received by the external reviewer.

The email chain is now available in the **External** tab of the **Communication Center** in the Wizard.

The contract manager will also receive an email response from the external reviewer.

End the external round by clicking the **Actions** button and selecting **Done with Review** or **End Round Now**. All communication is kept in the Communication Center.

Test Contract 015 contract has been forwarded to you   Inbox ×

Laura Shannon <notifications@network.jaggaer.com>
to SOI

11:51AM (1 hour ago)

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

Dear SOI Jaggaertest

This email is to inform you that Test Contract 015, contract 240051845, is available for your review. For your convenience the contract documentation has been attached to this email.

Thank You,

Laura Shannon
Department of Administrative Services State of Iowa

Support Team Contact Information:

+1 515-330-7325

purchasing.mailbox@iowa.gov

This comment was sent to SOI Jaggaertest. Your email response will be sent to all recipients in this conver

Unsubscribe | Subscribe

One attachment • Scanned by Gmail ⓘ

W DAS Contract Mai...

▾ **Current Round (External)**   (2/9/2024 -)   [End Round Now]

Tracking	Reviewer	Comment	Actions
Sent ⓘ	Jaggaertest, SOI	–	[Actions ▾]

> **Round #1 (Internal - Manual)**   (2/9/2024 - 2/9/2024)

Review Rounds

Contracts Wizard

Comments

The Comments section of the Contract Wizard is a place for the Contract Manager to start a discussion thread, or keep notes on the contract.

The **Internal** tab in the **Communication Center** is identical and has the same functionality.

It is recommended to use the **Communication Center** instead of Comments.

240051845
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

    Goods and/or Services ✔

    Commodity Codes ⚠

Alternative Language 0

Attachments 1

Obligations 0

Review Rounds 3

Submit for Approval

Comments 0

Communication Center 1

Users and Contacts

Notifications

Contract Family

Comments   View XML | History | ?

Start New Thread

There are no comments for this contract.

New Comment ✕

Subject * [|]

Message * [   ]

5000 characters remaining

Send Notification To [Name, User Name, Email 🔍]

* Required   Save   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Comments

Contracts Wizard

Communications Center

IOWA IMPACS
Iowa Management of Procurement and Contracts System

The **Communication Center** section of the Contract Wizard is a central place to manage correspondence about a contract.

The messages and their replies are saved and recipients will receive the response via email. The entire conversation thread can be viewed in the Communication Center.

240051845
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

　Goods and/or Services ✔

　Commodity Codes ⚠

Alternative Language 0

Attachments 1

Obligations 0

Review Rounds 3

Submit for Approval

Comments 0

Communication Center 1

Users and Contacts

Notifications

Contract Family

Communication Center

Internal (0)　External (1)

Add Internal Message

There are no communications on this contract yet

Communication Center

The **Add Internal Message** action sends emails or keeps notes about a contract.

To create a note or comment about the contract that only the contract manager and designated users can see, Fill in the **Subject** and add the note to the **Body** field, then click **Create**.

To send an email that will be saved with the contract, add Recipients who are IMPACS Users. Use the **External** tab for Vendors or Internal Stakeholders not registered in IMPACS (Optional).

Select attachments already in the contract or add new attachments to the email or note (Optional).

240051845
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

   Goods and/or Services ✓

   Commodity Codes ⚠

Alternative Language   **0**

Attachments   **1**

Obligations   **0**

Review Rounds   **3**

Submit for Approval

Comments   **0**

Communication Center   **1**

Users and Contacts

Notifications

Contract Family

Communication Center

Internal (0)   External (1)

Add Internal Message

There are no communications on this contract yet

Internal Communication ✕

Subject *

Body *

| Format ▼ | (inherited font) ▼ | (inherited size) ▼ | **B** *I* U |

Characters remaining: 50000

> Recipients (Optional)

> Attachments (Optional)

* Required

Create   Close

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Communication Center

In one of the Internal Messages, an **Attachment** was added:

From the Actions button, you may **Add or Update Main Document** (Contract MA document) or **Add/Update Attachment.**

The system will keep all the attachment versions so that you can go back and compare the changes to another version.

Note that you can add to the Conversation.

The **External** communication tab operates in the same way.

Conversation Details

View

| Internal (2) | External (1) |

Add to Conversation

Subject: Test with Attachment

Subscribers: Laura Shannon [Change Subscribers]

From: Laura Shannon **Sent On:** 2/9/2024 2:10 PM

Sent To: –

Subject: Test with Attachment

⬇ DAS Contract Main Document.docx

[Actions ▼]

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Please red-line the Contract

Compare With

Add/Update Main Document

Add/Update Attachment

Communication Center

Contracts Wizard

Users and Contacts

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

It is likely that you will not need to update this page and it can be skipped.

Contract Manager- The field is automatically populated with the contract manager, who has full control over the contract. This typically is the Contract Creator.

Stakeholders – Can view the contract and receive notifications.

Created by – The person who created the contract.

Users from the Department – General Public User include all IMPACS Users and the General Public. This is used for master agreements and any contracts that need public posting.

Make Confidential – This will limit visibility and access to only those users who are added directly to this contract in the section above this line.

Visibility Controls and External Contacts are managed by the system administrator.

240051845
Test Contract 015

Type:	005 DAS Single Agency Contract
2nd Party:	
Version:	Renewal 0, Amendment 0

Open Main Document ▼

Summary
Header ⚠
    Goods and/or Services ✔
    Commodity Codes ⚠
Alternative Language ⓪
Attachments ①
Obligations ⓪
Review Rounds ③
Submit for Approval
Comments ⓪
Communication Center ③
Users and Contacts
Notifications
Contract Family

Users and Contacts   View XML | History | ?

Contract Managers *	Full control over this contract	👤 Edit Users
	Shannon, Laura	
Stakeholders	View this contract and receive notifications	👤 Edit Users
	None	
Created by	Informative: Creator of this contract not related to permissions	👤 Edit Users
	Shannon, Laura	

❯ Users from Department (213)   Make Confidential

❯ Visibility Controls

❯ External Contacts

You can use External Contacts t...

External Contacts

❯ Users from Department (213)

Contract Administrators	Administrators have full control over this contract.
	Role: Admin
	Role: Central Procurement Buyer
	Role: Procurement
Contract Managers	Contract Managers from the department can view this contract, but cannot make changes.
	Role: Central Procurement Buyer
Stakeholders	Stakeholders from the department can view this contract, but cannot make changes.
	Role: General Public User

Contracts Wizard

Notifications

IOWA. IMPACS
Iowa Management of Procurement and Contracts System

In the **Notifications** section of the Wizard, you may select the types of events that you will receive (optional). Recommended selections are shown in the example.

Advance Notice Settings may be set for Start Date, End Date, Renewal Date, and Review Date (if enabled).

The Department, Stakeholders, and External Contacts may be notified if you check the corresponding box(es).

Enter the number of days in advance you would like to be reminded of the upcoming event. Leave a field blank to turn off that advanced notice.

Save Changes when done.

240051845
Test Contract 015

Type: 005 DAS Single Agency Contract
2nd Party:
Version: Renewal 0, Amendment 0

Open Main Document ▼

Summary

Header ⚠

   Goods and/or Services ✔

   Commodity Codes ⚠

Alternative Language   0

Attachments   1

Obligations   0

Review Rounds   3

Submit for Approval

Comments   0

Communication Center   3

Users and Contacts

Notifications

Contract Family

Notifications

View XML | History | ?

Who should receive each notification type?

Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Department	Contract	Department	
	☐	☐	☐	☐	☐
Start Date - Advance Notice	☐	☐	☐	☐	☐
Start Date Passed	☐	☐	☐	☐	☐
End Date - Advance Notices	☑	☐	☐	☐	☐
End Date Passed	☑	☐	☐	☐	☐
Renewal Date - Advance Notices	☑	☐	☐	☐	☐
Renewal Date Passed	☑	☐	☐	☐	☐
Review Date Passed	☐	☐	☐	☐	☐

Advance Notice Settings

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date			
End Date	120	90	60
Renewal Date	90	60	30

Save Changes

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Notifications

Contracts Wizard

Contract Family

The **Contract Family** screen lists all contracts connected to a contract Related contracts are grouped into two sections:

Parent/Child Contracts lists all contracts -parent or child of the selected contract.
A Child contract typically is a reseller to a parent contract. The example shows "Hon" as the parent company and "All Makes Office Interiors" as the reseller of Hon, therefore the child contract.

Contract Versions lists all amendments and renewals of the contract. You may view **all versions** of the contract from this screen.

23128
Office Furniture and Related Service and Solutions

Type:	Master Agreement - Cooperative
2nd Party:	Hon Company The
Dates:	1/22/2023 - 1/21/2028
Version:	Renewal 0, Amendment 0

> Lifetime Spend (USD)

View Contract ▾

Summary
Header ✔
    Commodity Codes ✔
Alternative Language ⓪
Attachments ⑧
Obligations ③
Review Rounds ⓪
Approvals

eProcurement Setup
Budget and Spend
Applies To
Goods and Services
PO Clauses

Comments ⓪
Communication Center ⓪
Users and Contacts
Notifications

Contract Family

View XML History ?

Contract Family

Link a Child to this Contract ▾

Parent/Child Contracts

Expand All Collapse All

Parent

Contract No.	Contract Type	Primary Second Party	Total Contract Versions	View Contract Versions
▾ 23128 **This Contract**	Master Agreement - Cooperative	Hon Company The	1	Shown Below
23149	Master Agreement - Cooperative	All Makes Office Interiors	1	View Details ▾

Child (reseller)

23128 Contract Versions (1)
All of the following contracts are in Central Standard Time.

Status	Version Type	Version Numbers ▾	Primary Second Party	Start Date	End Date	Create Date △
Executed: In Effect	Original	ⓘ Renewal 0, Amendment 0	Hon Company The	1/22/2023	1/21/2028	2/8/2023

There are no renewals or amendments

Contract Family

The Contract Family screen also allows you to create a child contract (in the dropdown menu at the top of the screen) or link a child contract to your contract.

Click the info icon to open the Contract Summary, and from there, you may open the contract by clicking **Go to Contract.**

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Contract Family

Contracts Wizard

Submit for Approval

IOWA IMPACS
Iowa Management of Procurement and Contracts System

The next step is to **Submit for Approval**.

If you have skipped a required step when creating the contract, you will see the **Progress** as **Incomplete**.

You may navigate to the item needing attention by clicking the item hyperlink.

Draft | Once done authoring, reviewing, and negotiating this contract, submit it for approval.

Contract Actions ▾

🔒 This Contract is currently checked out to You | It is locked and cannot be edited by others until you check it in. | Check In

240051845
Test Contract 015

View XML | History | ?

Type: | 005 DAS Single Agency Contract
2nd Party:
Version: | Renewal 0, Amendment 0

Open Main Document ▾

Summary
Header ⚠
   Goods and/or Services ✔
   Commodity Codes ⚠
Alternative Language ⓪
Attachments ①
Obligations ⓪
Review Rounds ③
Submit for Approval
Comments ⓪
Communication Center ③
Users and Contacts
Notifications
Contract Family

Submit for Approval

❌ You must complete all required fields and sections to submit this contract for approval. | ?

Section	Progress	Action Needed on the Following
Header	⚠ Incomplete	❌ Payment Terms
		❌ Shipping Terms - Free on Board
		❌ End Date
		❌ Contract Fee
		❌ Primary Terms and Conditions
		❌ A commodity code is required.
		❌ Start Date
		❌ Contract Applies To
		❌ Vendor
		❌ Renewals Remaining
Review Rounds	③ Required Fields Complete	

❯ **View Approval Steps**

‹ Previous | Submit for Approval

Submit for Approval

You will see a green checkmark in the Progress column when all required fields are completed.

To view the Approval Steps and to view the approvers for this contract, expand the **View Approval Steps** field.

Click **Submit for Approval**

If you self-approve your contracts, the IMPACS system administrator can set up the contract to automatically approve. Please contact laura.shannon@iowa.gov to set up an approval workflow.

Submit for Approval

View XML | History | 📄 | ?

✔ All sections are complete. You may submit your contract for approval.

Section	Progress
Header	✔ Required Fields Complete
Review Rounds	⓪ Required Fields Complete

⌄ **View Approval Steps**

Show skipped steps ☐

Orientation [Horizontal ⌄]

➡️
Submitted
Future

Compile Robot
Future ➡️

Contract Approval
Future ➡️
View approvers

🏁
Finish

‹ Previous   **Submit for Approval**

Submit for Approval

Contracts Wizard

Search for Contracts

IOWA IMPACS
Iowa Management of Procurement and Contracts System

To search contracts, navigate to the Contracts Menu, type in the contract number or keywords in the Quick Search box, and click the magnifying glass icon or hit Enter on your keyboard.

Contract Search

For a more robust search, navigate to Contracts>Search Contracts.

Contract Search

The Simple Search Contracts page opens. **Click Advanced Search**.

IOWA IMPACS
Iowa Management of Procurement and Contracts System

All ▼   Search (Alt+Q)

Contracts ▶ Contracts ▶ Search Contracts

Search Contracts

Advanced Search | ?

Contract ❓   Search by contract name, number, summary, etc.   🔍

By Start/End Date   Effective ▼

Created Date   All Dates ▼

The Advanced Search Contracts – Advanced page shows multiple search filters that will not only allow you to drill down to specific contract information but also allow you to export the data in an Excel report and save the search parameters for easy searching in the future.

Select the filters, then click Search at the bottom of the screen.

Search Contracts - Advanced

Contract Number		Second Party	● Any of ○ All of
Contract Name			Type to filter...
Keywords		Department	Type to filter...
Contract Type	Type to filter...	By Start/End Date	Effective ⌄
Contract Status	Type to filter...	Created Date	All Dates ⌄
Contract Version Type	⌄	Approvals Completed	All Dates ⌄
Contract Manager	○ Any ○ Me ● Pick...	Scheduled Termination Date	All Dates ⌄
	Name, User Name, Email	Contract Term Extended	⌄
Contract Stakeholder	○ Any ○ Me ● Pick...	Include Archived	No ⌄
	Name, User Name, Email	Contract Ended Early	⌄
Summary		Reporting Commodity Code	Code, Description

☐ Include Additional Commodity Codes

Expand All | Collapse All

> **Contract Value**

> **Contract Party Options**

> **Custom Contract Fields**

> **Renewal**

> **Communication Center**

🔍 Search

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Contract Search

You may save this search for easy access in the future.

Click the Save Changes button.

Contract Search

Create a personal folder to save the search in if you don't have one already. Click the **Add New** link to create a folder.

Then name your search in the Nickname field.

Click Save

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Nickname *

> Add Description

Step 2: Select Destination Folder

Add New ▼

▲ **Personal**
   Contracts
   DAS CP PA Contracts
   IDR
   Laura's Contracts
   Reports
   Solicitations
   Test
   Vendor Searches

▲ **Shared**
   Contracts
   Public User Contracts

Step 3: Select Export Template

Action   Excel Export ▼

Include Custom Fields in Export   ☑ Include Custom Fields in Export

★ Required   Save   Close

Navigate to Contracts>View Saved Searches to view your saved folders and the saved searches in the folders.

Navigate to Contracts>View Saved Searches to view your saved folders and the saved searches in the folders.

Click on the name or the **Go** button to navigate to the results of the search.

You can initiate several actions from the actions buttons to the right of the search.

You may export the search as an Excel or CSV file, edit, move, copy or delete the search.

Shortcuts will add the search to the Search page – See next page.

Contract Search

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Contracts Wizard

Renewals

IOWA IMPACS
Iowa Management of Procurement and Contracts System

To use the IMPACS renew function. Navigate to the **Contracts Action** button in the top right of the contract screen. Select **Renew**.

Renewals

IMPACS automatically changes the contract term dates and *one* of the "renewals remaining" fields. If there is a second renewal remaining field in the Header under "Contract Information", it must be updated manually.

If pricing updates are needed, update in the Goods and/or Services section.

Dates and Renewal

Time Zone *	CDT/CST - Central Standard Time (US/Cent ▼)
Start Date *	04/01/2024 12:00 AM 📅
	mm/dd/yyyy hh:mm a
	☐ Update Start Date Upon Execution ❓
End Date *	● Expires On ○ Term
	03/31/2025 11:59 PM 📅
	mm/dd/yyyy hh:mm a

Renewals Remaining	1
Renewal Term	1	Years ▼
Auto-Renew	○ Yes ● No
Renewal No.	1

This field automatically updates

> Additional Details

Contract Information

Contract Applies To * ❶	All State Agencies, Governmental Entities & Political Subdivisions ✕ 🔍
Cooperative Entity ❶	NASPO ValuePoint ▼
Cooperative Contract #	MNV-123
Contract Websites	https://www.naspovaluepoint.org/portfolio/software-var-2016-2022/
	1935 characters remaining
Renewals Remaining * ❶	2 ▲▼
	❶ Field Validation

Update this field to match the renewal field above

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Renewals

Note the **Renewal Action** button at the top right of the screen. From here you can **delete the renewal** if you make a mistake.

The **Main Document** will also update automatically with the new information.

Download the new Main Document from the Attachments section, get your signatures, and then upload the signed main document to Attachments. Make sure it is assigned as the main document (crown icon).

When ready, **Submit for Approval**. Once approved, the contract is renewed and has the status of **Executed: Future.** The contract number stays the same – unlike I/3, which needs a letter added to the end of the number.

To find your contract, make sure you search for the status of **Executed: Future** and save that search in your saved searches.

Draft — Once done authoring, reviewing, and negotiating this renewal, submit it for approval.

Renewal Actions ▼

- Check In
- Terminate
- Copy
- Delete Renewal
- Add Internal Message
- Start External Communication
- View/Reactivate Subscribers
- Queue for Export

🔒 This Contract is currently checked out to You

It is locked and cannot be edited by others until you check it in.

DAS-005-2024-40129
Test Contract 017

Type:	005 DAS Single Agency Contract- TEST
2nd Party:	SOIJAGGAERTEST
Dates:	4/1/2024 - 3/31/2025
Version:	Renewal 1, Amendment 0

Open Main Document ▼

- Summary
- Header ✓
  - Goods and/or Services ✓
  - Commodity Codes ✓
- Alternative Language ⓪
- **Attachments** ③
- Obligations ⓪
- Review Rounds ⓪

Submit for Approval

Attachments   View XM

General (3)   Internal Only (0)   Obligations (0)

Add Attachments ▼

Print Order ▲	Attachment △	Print with Full Contract △	Show on Vendor Portal △	Version △	Size △	Date Uploaded △	
1 ♛	⬇ Main Document DAS Contract Main Document.docx	✓	✓	1	33 KB	2/9/2024 4:09:42 PM	Actions ▼
2	⬇ Special Terms and Conditions.pdf	✓	✓	1	33 KB	2/9/2024 4:09:42 PM	Actions ▼
3	⬇ Price List.pdf	✗	✗	1	78 KB	2/9/2024 4:09:42 PM	Actions ▼

IOWA IMPACS
Iowa Management of Procurement and Contracts System

Renewals

Contracts Wizard

I/3 Renewals

Inputting contracts in I/3: **After** completing the renewal process in IMPACS, change the **end date** in I/3 and **upload** the signed main document.

Update any pricing on the commodity lines as necessary.

DO NOT change the contract number in I/3.

To **End the Contract Early** or **Terminate** a contract, click on **Contract Actions** and select the action from the dropdown menu.

You may reverse the **End Early** action by clicking Contract Actions and selecting **Return to Executed**.

When selecting **Terminate Contract**, a pop-up window opens. Note: Terminating the contract cannot be undone.

Reporting on Obligation status is achieved by navigating to the Obligations against contacts.

Obligations

This screen opens. First, select **More Options**.

Obligations

Select the Filters that apply to the report – Contract Manager, Department, etc.

Also, select the **Obligation Status** that will be reported and include the correct tag for the obligation.

Click **Run Report**

Contracts ▸ Reports ▸ Obligations Across Contracts

Obligations Across Contracts

Due Date From

mm/dd/yyyy hh:mm a

Due Date To

mm/dd/yyyy hh:mm a

Obligation Status

Overdue ✕   Upcoming ✕

Tags

coi ✕

Hide Options

Contract Type

Type to filter...

Department

Type to filter...

Contract Manager

Name, User Name, Email

First Party Owner

Name, User Name, Email

First Party Stakeholder

Name, User Name, Email

☐ Only My Obligations

Clear   🔍 Run Report

The results will appear under the filter box. Sort using the column arrows. You may also complete the obligation from this page.

Export the report as an Excel spreadsheet by clicking the Export button.

The **Export Request** pop-up will appear. Add a short description in the box. Click the **Go to Page: Download Export Files** button. Click the refresh button until the file completes the download. Click the file name to download.

| | | | | | Export |

Due Date From
mm/dd/yyyy hh:mm a

Due Date To
mm/dd/yyyy hh:mm a

Obligation Status
Overdue × Upcoming ×

Tags
coi ×

Hide Options

Contract Type
Type to filter...

Department
Administrative Services - DAS ×

Clear   🔍 Run Report

Export Request   ✕

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

100 characters remaining

Submit

Export Request Submitted   ✕

The export request has been successfully submitted.

Pending and completed exports are available in:
Contracts > Contracts > View Import/Export Results

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

Go to Page: Download Export Files   Close

Renewal (COI) 📎   Liability Insurance Certificate (COI)   CST ↻

Insurance Certificate Renewal   Annual review of Liability   **Overdue**   6/12/2023 11:59 PM CDT   coi   Denny   Commu nication   Master Agreem   BUISNESS SYSTEMS   Grier

Reports - Obligations

Click the refresh button until the file completes the download.

Click the file name to download.

Reports - Obligations

By navigating to Contracts>Reports>Contracts that Require Attention, you can run a report on contracts that will expire soon or need to be renewed.

Reports – Expiring or Renewing Contracts

This screen opens first, but by clicking **More Options**, there will be more filter options.

Contracts that Require Attention: Expiring Contracts

List of "expired" or "expiring" contracts, with a specified end date range, that do not have an executed renewal or amendment in place.

Contracts Ending Within: * | 0-30 Days ▼ | Renewal/Amendment Status: | ▼ | More Options

☐ Only My Contracts | Renewals Remaining: | One or more ▼

Clear | Run Report

Select the filters for the report and click **Run Report**.

Contracts that Require Attention: Expiring Contracts

List of "expired" or "expiring" contracts, with a specified end date range, that do not have an executed renewal or amendment in place.

Contracts Ending Within: * | 0-30 Days ▼ | Contract Type | Type to filter... 🔍 | Hide Options

Contract Manager | Name, User Name, Email 🔍 | Renewal Status | Type to filter... 🔍

Renewals Remaining: | One or more ▼ | Amendment Status | Type to filter... 🔍

Clear | Run Report

Reports – Expiring or Renewing Contracts

The example on the right is the top section of the reporting page. You may save the filters you choose for future reports and the **Export** button will export the report as an Excel spreadsheet.

Contracts that Require Attention: Expiring Contracts

List of "expired" or "expiring" contracts, with a specified end date range, that do not have an executed renewal or amendment in place.

Save Filters | Export

Contracts Ending Within: *	0-30 Days	Contract Type	Type to filter...	Hide Options
Contract Manager	Bennett, Randy ×	Renewal Status	Type to filter...	
Renewals Remaining:	One or more	Amendment Status	Type to filter...	

Clear   Run Report

⌄ Graphs

By Expiration

Currently Expired — 0
Expires in 1 Week — 3
Expires in 1 Month — 8
Expires in +1 Month — 1

Number of Contracts
(Total in this report: 12)
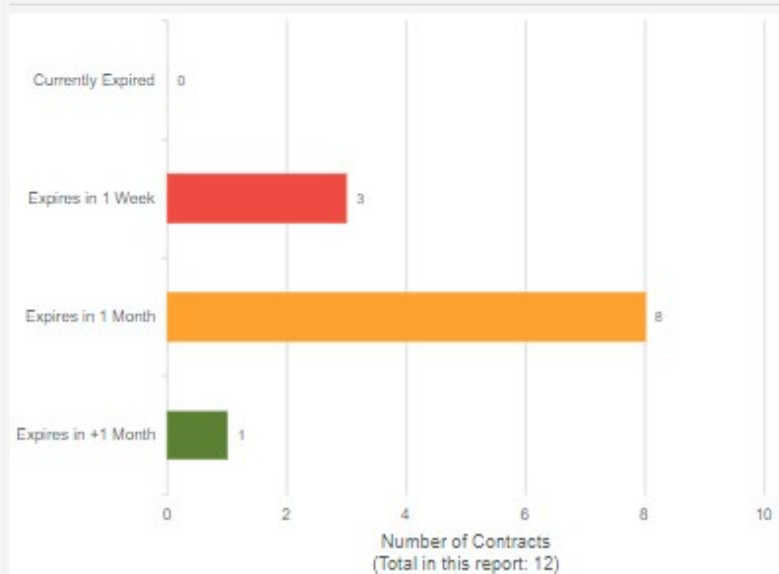
Renewal and Amendment Status

No Renewal/Amendment — 12
Renewal In Progress — 0
Amendment In Progress — 0

Reports – Expiring or Renewing Contracts
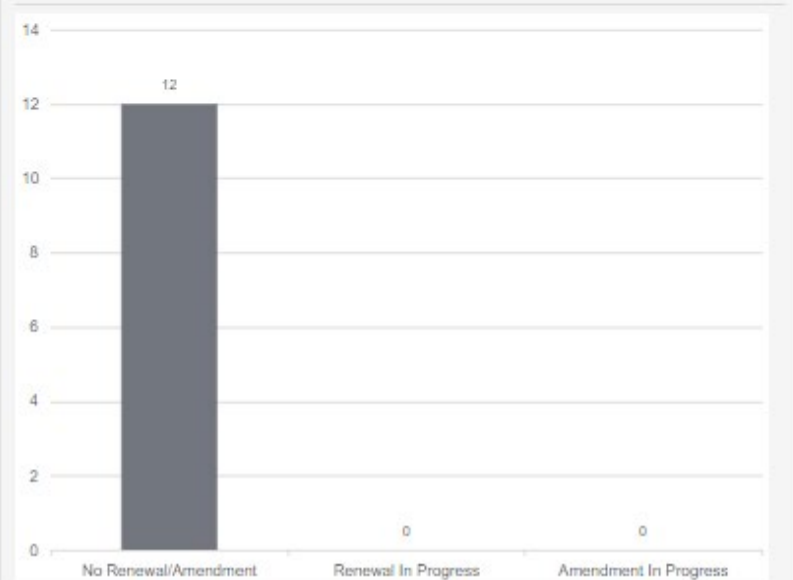
The example on the right is the bottom section of the reporting page. The list icon and the calendar icon are located at the top.

Calendar view

Reports – Expiring or Renewing Contracts

Questions?

Please contact laura.shannon@iowa.gov

Or call 515-330-7325