"HOW TO" GUIDE TO IPRO

HOW TO CREATE A REQUEST

- Select "Request" > Create New Request
- Select Off-Catalog Request
    1. Enter Info (Quantity, Unit, Estimated Unit Price, Service or Commodity Code, and Item Description)
    2. Click Add
    3. Rename Request at the bottom of the page > Click Save (Floppy Disk)
    4. Select "View Request"

- View Request
    1. Add Attachment
    2. Select Buyer Contact

- At the Line Item > Select the magnifying glass
    1. Adjust "Bill To" and "Ship To" address to their respective locations > Click Save

- Supplemental Data
    1. Select PO "Type"
    2. Select "Service Start Date"
    3. Select "Service End Date"
    4. Input "General Instructions"
    5. Click "Update Request"
    6. Click "Submit Request"

HOW TO CREATE A SOLICITATION FROM A REQUEST

- Select “Approval” > Approval Inbox
- Click “Create Solicitation”
    1. Select Solicitation Type (Formal or Informal)
    2. Enter Info (Title (Name of solicitation), Solicitation Type, Description, Payment Terms, and Solicitation Duration)
    3. Click “Next Step”

- Requirements
    1. In this section, you will need to select any Special Terms and Conditions/Requirements that is not in your solicitation
    2. Click “Next Step”

- Documents
    1. Click “Add new document”>This is where you add any revised solicitation documents, bid schedules, etc.
       ***NOTE**: You will need to remove your original documents
    2. Click “Next Step”

- Item Specifications
    1. Nothing to do here
    2. Click “Next Step”

- Suppliers - You can add suppliers beyond the commodity code originally selected at request. To add suppliers:
    1. New Search > Categories > Click “Select”
    2. Enter Category Code or Keyword > Search
    3. Check commodities you want > Click “Select”
    4. Search > You can add individual supplier or add all suppliers
    5. Click “Next Step”

- Summary > This screen provides an overview of your solicitation. This is called the header document and this screen provides vendors a brief overview of the solicitation.
  ***NOTE:** Vendors are required to download the attachments to view the full version of the solicitation. If the information looks accurate, click “Submit”.

- Your solicitation will either be released or waiting approval, depending on your authorization for release. You can view your solicitation by:
    1. Solicitations > View Current (Informal or Formal)
    2. If additional approval is required > Un-Issued Solicitations
       If solicitation is released > Active Solicitations

HOW TO CREATE AN AWARD FROM A SOLITICATION

- Solicitations > Review/Award
- Under “Actions” > Evaluate Suppliers Response
    - Paper Response – Where you will input a manually submitted quote/bid/proposals for the vendor
    - Review Suppliers and Documents – Allows for the visibility of any electronically submitted quote/bid/proposals and any uploaded documents
    - Award By Item – Ability to award by line item to different vendors
    - Award All to One – Ability to award all line items to a specific vendor

  1. Select Method of Award > Award By Item or All to One
  2. Click check box next to vendor receiving award
  3. Click “Done”
  4. Click “Done”
- Under “Actions” > Finalize Award
  1. Uncheck All
  2. In Confirmation box write “yes”
  3. Click “Submit”
  4. Click “Update Request”

UPDATE REQUEST

- The purpose of “Update Request” is to allow the Buyer to update any missing or additional information and to add all the documents that will make up the Contract (i.e. Solicitation, Bid Schedule, T’s and C’s, Signature Page, Amendments, Vendor’s quote/bid/proposal, etc.)
    1. Attachments > Add all the necessary documents that will make up the Purchase Order
    2. Buyer Contact > Select whom the Buyer of record is going to be
- Supplemental Data
    - ➢ Type > Select the type of Purchase Order (i.e. Contract Purchase Order, Purchase Order, etc.)
    - ➢ Service Start Date > Date the Contract begins or if direct Purchase Order, the date which the Purchase Order will release
    - ➢ Service End Date > Date the Contract ends or if direct Purchase Order, the delivery date
    - ➢ General Instructions > Add Purchase Order language
    1. Click “Update Request”
    2. Click “Approve With Change”

- This completes the process. Your original request will be updated with all the new information and the request will be removed from your “Approval Inbox”