Completing the Quick Quote IPHEC2140 IT Contract Form

The IPHEC2140 Contract - Information Technology Recruiting & Professional Services form is explicitly for use in the purchase of IT Consulting Services from contracts obtained because of IPHEC2140. Before completing this request, please review the IT Consulting Contracts Website to confirm your request falls within one of the 15 categories.

Upon submitting this form your request will be sent to all 53 awarded vendors. They will have five business days to respond directly to you via email.

1. Log into iBuy.

2. From the Home page, click **Quote Request – IPHEC2140 IT Contract - Information Technology Recruiting & Professional Services** found in the **University Forms** section.

3. Review the **Instructions** page.

4. Click **Next**.

5. On the **Quick Quote Request** page, replace **[user email]** with the email the vendor should reply to and replace **[MM-DD-YYYY]** with five business days from the day you create the quote.

6. Click **Next**.

    a. **NOTE:** The information will automatically save.

7. Add **Attachment**. Attach the Scope of Work.

    a. Click **Add Attachment**.

    b. Click **Upload**.

    c. Give the document a **Title** such as Scope of Work or the Project Name.

    d. Click **Choose File** to browse for the file and click **Open**.

    e. Click **Save Changes**.

    f. Check the box **Send attachment to Supplier** so the document goes with the email to the vendors under contract.

    g. Click **Save Changes**.

8. Click **Next**.

9. On the **Project Details** page, populate the required fields with details specific to the project.

    a. **Title of Project**

    b. **Estimated Project Start Date**

      c. **Estimated Project End Date**

      d. **Need Vendor Quote by Date** – This date should match the date you provided on the Quick Quote tab. The date should be five business days from the day you send the quote request.

      e. **Category Name** – Select one of the 15 categories pertaining to the quote request. Details can be found on IT Consulting Contracts Website.

      f. **Note to Supplier** – Any additional details that need to be sent to the vendors should be provided here. Up to 2000 characters.

10. Click **Next**.

11. Click **Next** on the **Service Line Items** page. This page will be used later when the vendors reply. No action needed when creating a quote request.

12. **Suppliers** page: This page lists all 53 vendors under contract for IPHEC4120. All vendors on this list will receive the email and opportunity to quote for the project.

13. Click **Next**.

14. Click **Submit** if you are ready to email the vendors. You may go back through the form to make changes by clicking the tabs on the left side of the form. Remember to click **save** on the page you make a change.

15. Confirm popup box. Click **Yes** if you are ready to submit and send the quote to the vendors.

How to Search for Submitted Quick Quotes

1. If the Form Number is known, type the number in the quick search box at the top of the iBuy page.

2. From the left navigation of iBuy, click **Orders** > **My Orders** > **My Procurement Requests or Orders** > **Search** > **Procurement Requests**.

      a. **NOTE:** You can add filters to narrow down the search results.

How to Enter Quote Details from the Vendors

Once the 5-day quoting deadline has passed and vendors have responded, it is recommended to enter at least the top 3 quotes on the original Quick Quote form. **The 5-day quoting period is the minimum requirement. Any requisition submitted that identifies a quoting period less than 5-days may be returned by Purchasing.** Refer to *How to Search for Submitted Quick Quote* above.

1. Within the Quick Quote, click **Enter Quotes**.

2. There is an entry for each vendor, called **Service Line Items**.

3. Enter the overall Quoted Unit Price for the top three vendors.

4. Click **Save Progress**.

How to Move the Winning Quote to a Requisition

1. Within the Quick Quote, click **Enter Quotes**.

2. Next to the Supplier that you've deemed the best value/winner of the quote request, click **Create Cart**.

3. Click **Yes** to the pop-up box question, "You are about to finalize quick quote pricing and create a cart."

4. Proceed to checkout.

5. **Required! Internal Notes and Attachments** – Attach the remaining top two Quote documents (at minimum), from the Vendors that DID NOT win the bid. Make sure to attach the quote for **Internal** viewing only.

6. Enter **IPHEC2140** in the **Bulletin Award Number** field.

7. **Required! External Notes and Attachments** – Attach the winning bid quote documents from the vendor. Make sure to attach the winning quote for **External** viewing so the vendor received a copy with the Purchase Order.

8. Optional: Add a comment to the **Comments** section if justification needs to be added on why the winning quote was selected.

   a. Click **Comments** from the top of the requisition.

   b. Click the **+** sign.

   c. Type the comment in the **Add Comment** box.

   d. Click the check mark to add the comment.

9. Validate and update any other applicable fields such as ShipTo and Accounting string.

10. Click **Place Order**.