ARIZONA
PROCUREMENT PORTAL

Creating Contracts and Awarding Solicitations

This document is a quick-reference guide for procurement users who would need to create contracts and award sourcing projects in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO Website: https://spo.az.gov/

When a Procurement Officer is ready to start the Contracting process, they can create a draft award in APP. Please note than when a draft award is created, no notifications are sent to the suppliers and no notice is put on the Public Portal. In addition, draft awards can be changed at any time. After the Procurement Officer responsible for the solicitation has decided which suppliers they would like to potentially award a solicitation to, they will create and complete a new contract.

Creating and completing a contract at the State of AZ may be broken down into seven main tasks: providing general information, identifying contacts, establish dates and renewals, detailing negotiated terms, uploading supporting documents, confirming price lists, and adding subcontractor and distributor details. Once a Procurement Officer has completed a draft contract for their award they will go back to the associated sourcing event and notify the suppliers that were involved in the solicitation.

Creating a Draft Award

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to create a draft award and then click the (**Pencil)** icon to open it.
3. Navigate to the **Analyze & Award** tab and then go to the **Awarding** section.
4. From this page you can award based on percentage, dollar amount, and/or quantity. To enable a multiple award, select *Yes* from the dropdown.
5. Enter criteria in the **Mass Award** window for the award you would like to make and then click **Apply Mass Award** or use the **Select algorithm** drop-down and **Apply algorithm** button to make awards based on *Best overall bid, Best price on each line, Best rating,* etc.
6. Click the **Confirm Award** button and then the **OK** button once you have created your draft award.

Note: In addition to awarding from the **Awarding** section, you can also award from the **Proposals** section with the **Decision** column if you are awarding the solicitation to only one supplier.

(continued on next page)

ARIZONA
PROCUREMENT PORTAL

Creating and Completing a Contract

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to create a draft award and then click the **Pencil** icon to open it.
3. Navigate to the **Synthesis** tab and then click the **Create/Update a contract** button for the contract you award you wish to create a contract for.
4. Select that you are creating a new contract and then enter the contract's **Label, Type,** and **Contracting Agency.**

Note: You should use the commodity code as the basis for the Label field of a contract. Avoid using acronyms (except for industry standards such as AAMVA, AASHTO, FHWA) and other abbreviations, as this could make searching for contracts and bids more difficult for our suppliers, customers and interested public.

5. Select the documents, team members, and line items you want to carry over from the solicitation.
6. Click **Save & Close.**
7. The contract has been created and is displayed on screen. Click the blue hyperlink will display the full contract details.
8. On the **Header** tab specify the **Scope of Application** for the contract, which creates the relationship between the contract and the agency assigned to the contract and determines who can view the contract. When specifying the scope of the application, the procurement users will select the associated agencies and commodities for the contract.
9. Navigate to the **Contacts** tab and add any additional internal or supplier contacts by clicking the **Create a Contact** button.
10. Navigate to the **Dates and Renewals** tab and enter the contract's **Effective Date, Initial End Date, Renegotiation Period (months), and Renegotiation Date.** Click the **Save** button.
11. If desired, navigate to the **Negotiated Terms** tab and add any payment terms, warranty terms, delivery terms, etc. Click the **Save** button. These terms are not visible to the supplier.
12. Navigate to the **Exhibits** tab and add any necessary documents using the **Add document** button.
13. Navigate to the **Price List** tab and review the information displayed to ensure it is correct. Use the **Create an Item** button if you did not create this contract from a solicitation. In addition, In the procurement user responsible for the contract add Contract Tags for the contract's line items such as indicating if the items are part of a Standard Contract Release or are Punch-Out Enabled.

(continued on next page)

ARIZONA
PROCUREMENT PORTAL

Finalizing an Award

Once you are ready to finalize a award and notify the associated supplier(s), please refer to the below steps:

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to finalize the award for and then click the **Pencil** icon to open it.
3. Navigate to the **Synthesis** tab.
4. Click the **Selected : to be notified** hyperlink for the supplier you wish to notify of the award.
5. Adjust the email message as necessary and then click **Send & Close.**
6. Continue to notify the remaining suppliers as needed.
7. If you contract is required to be posted on the Public Portal, click on the **Contract Number** hyperlink, navigate to the **Header** tab, and then click the **Public Contract** checkbox. This will automatically publish the contract once it is approved and signed.

Submitting a Contract for Review

1. From any page in APP, select **Browse Contracts** from the **Contracts** drop-down menu.
2. From the **Browse Contracts** page, click on the **Pencil** icon for the contract you wish to open.
3. Navigate to the **Workflow** tab and then click the **Send Contract for Approval** button.
4. The workflow has updated based on the requirements of your agency and the contract has been sent to the appropriate user for review.

Once a procurement user submits a contract for review, the Contract workflow is engaged in the system. This workflow has been designed to automatically route the contract through the appropriate approval workflow based on the agency of the user who created the contract. Procurement users can see the status of this workflow at any time by navigating to the Workflow tab of the contract.

The system will automatically determine if a Procurement Manager and/or CPO is required to approve a contract.

Note: In addition to creating contracts from a sourcing project, you are also able to create contracts by selecting **Create** from the **Contracts** main menu navigation drop-down menu. When you create a contract this way, you will need to manually add the header details, documents, team members, and line items for the contract.