

Creating New Rounds and Lots

This document is a quick-reference guide for procurement users who would like to create a new round and/or lot for their sourcing project in the Arizona Procurement Portal (APP). If you have any questions or need assistance, please reach out to your change agent. 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/>

After a solicitation has been created and prepared, there may be an instance in which a new round or lot may need to be created:

- **New Round:** A new round is typically issued whenever there is amendment to the original solicitation or when you want to issue a second round of bidding for a shortlisted group of suppliers. All new rounds will be treated as a child of the original sourcing project.
- **New Lot:** A new lot is created when there are parallel sourcing projects occurring that have the same requirements, but would require different offers and evaluations (e.g., trying to build parks in multiple cities).

Please note that issuing a new round or new lot will retrigger the solicitation approval workflow.

Creating a New Round

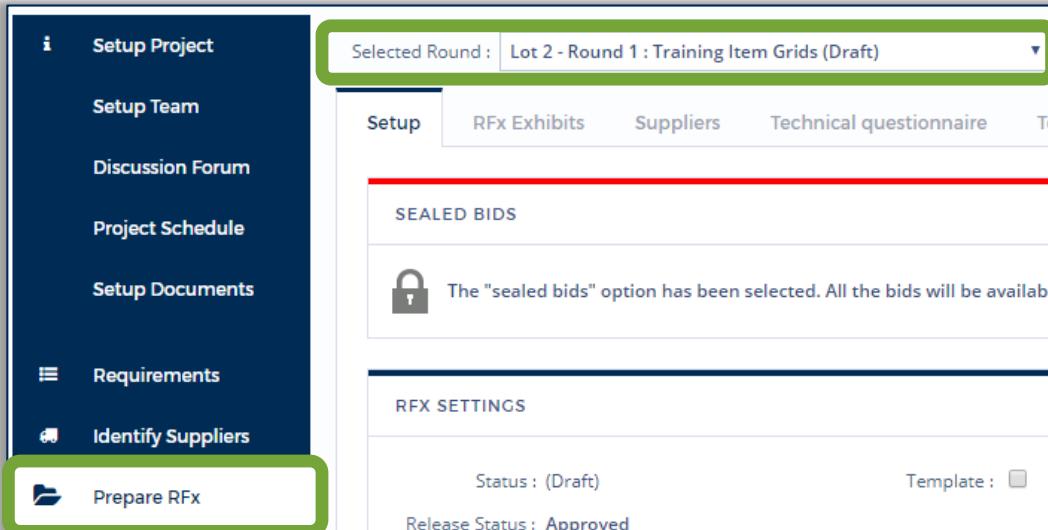
1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to create a new round for and then click the  (**Pencil**) icon to open it.
3. Navigate to the **Prepare RFx** tab.
4. Click the **Other Actions** button and then select **Create a new round**.
5. Confirm the tabs that you want to be duplicated, click **Create** and then click **Continue**.
6. Enter the reason for the new round in the **Summary** field, make any updates to the bid dates, and then click **Save**.
7. Click on the **RFx Exhibits** header and then upload any new amendment documents.
8. Click on the **Suppliers** header and then select the suppliers that you wish to include in the new round.
9. Continue to make changes to the solicitation as necessary to capture the details of the new round.
10. After you done preparing your new round, click the **Send Solicitation for Approval** button.

Creating a New Lot

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 new lot for and then click the  (Pencil) icon to open it.
3. Navigate to the **Prepare RFx** tab.
4. Click the **Other Actions** button and then select **Create a new lot**.
5. Confirm the tabs that you want to be duplicated, click **Create** and then click **Continue**.
6. Enter the reason for the new lot in the **Summary** field, make any updates to the bid dates, and then click **Save**.
7. Click on the **RFx Exhibits** header and then upload any new amendment documents.
8. Click on the **Suppliers** header and then select the suppliers that you wish to include in the new round.
9. Continue to make changes to the solicitation as necessary to capture the details of the new round.
10. After you done preparing your new lot, click the **Send Solicitation for Approval** button.



Note: You are able to previous rounds and lots by selecting the round or lot you would like to view on the **Selected Round** drop-down menu that is available on the **Prepare RFx** tab:



The screenshot shows the 'Prepare RFx' tab interface. On the left, a sidebar lists project management tasks: Setup Project, Setup Team, Discussion Forum, Project Schedule, Setup Documents, Requirements, Identify Suppliers, and Prepare RFx. The 'Prepare RFx' button is highlighted with a green box. At the top right, a green bar displays the 'Selected Round : Lot 2 - Round 1 : Training Item Grids (Draft)' dropdown. Below the bar, the 'Setup' tab is active, showing sections for 'SEALED BIDS' (with a note about sealed bids being selected) and 'RFX SETTINGS' (with status and template fields). Other tabs include 'RFx Exhibits', 'Suppliers', 'Technical questionnaire', and 'Template'.