

## Creating Sourcing Project Templates

This document is a quick-reference guide for procurement users who want to create sourcing project templates in the Arizona Procurement Portal (APP.) If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov). Additional resources are also available on the SPO Website: <https://spo.az.gov/>

APP allows procurement users to create two different types sourcing project templates:

1. **Project-Level Templates:** When a procurement user creates a project-level template they are able to save information on the Setup Project, Setup Team, Project Schedule, Setup Documents, Requirements, and Identify Suppliers tabs.
2. **RFx Templates:** When a procurement user creates an RFx template they are able to save information on the Prepare RFX tab and its associated headers – Setup, RFx Exhibits, Suppliers, Technical questionnaire, Technical evaluation questionnaire, Financial questionnaire, and Items.

Once a template has been created, it is accessible to procurement users across your agency and can be applied to accelerate the sourcing process.

### Creating a Project-Level Template

1. From any page in APP, select **Create** from the **Sourcing** drop-down menu.
2. From the Create New Sourcing Process page, select the **Sourcing Project Type** (*RFx, Spot Bid*), enter a description for the project-level template in the **Label** field and your **Agency**.
3. Select the **Commodity** for the sourcing project.
4. Click the **Is a template** checkbox.
5. Click the **Save** button.
6. The project-level template has been created. Update information across the Setup Project, Setup Team, Project Schedule, Setup Documents, Requirements, and Identify Suppliers tabs as needed and then click the **Save** button.



**Note:** To apply a project-level template to a sourcing project follow the below steps:

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Click the **Duplicate a Sourcing Project** button.
3. Click the **Ellipsis** icon to search for and select the project-level template or previous sourcing project you wish to copy.
4. Click **Copy and close** to create a new sourcing project based on the template.

## Creating an RFx Template

1. Navigate to the **Prepare RFx** tab of the sourcing project you wish to create an RFx Template for.
2. Click the **Template** checkbox.
3. Update information as necessary across the Setup, RFx Exhibits, Suppliers, Technical questionnaire, Technical evaluation questionnaire, Financial questionnaire, and Items headers on the **Prepare RFx** tab.
4. Once you are done making updates across the headers, click the **Save** button.

## Applying an RFx Template

1. Navigate to the **Prepare RFx** tab of the sourcing project you wish to apply an RFx template to
2. Select **Get data from RFx / template** from the **Other Actions** drop-down menu.
3. Search for and select the template you wish to apply.
4. Select what you would like to keep unchanged, copy and add, and copy and replace from the template.
5. Click the **Save & Close** button to apply the RFx template.



**Note:** When creating sourcing project templates, it is best practice to not run a sourcing project template through the sourcing process. This means that the initial sourcing project file you created in order to create a sourcing project template should never be sent for approval or sent to suppliers. In addition, when creating sourcing project templates, please make sure the **Label** field contains the word “template” so that it is easy to identify that the sourcing project is a template. You can easily browse project-level templates on the Sourcing page by clicking the **Is a template** checkbox.