

Creating and Configuring a Sourcing Project

This document is a quick-reference guide for procurement users who need to need to create and configure 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/>

To start the Solicitation Creation process, a Procurement Officer will log in to APP and create a new sourcing project. The Procurement Officer will then set up their project team, project schedule, and project documents. Once the sourcing project has been configured, the Procurement Officer can proceed with identifying suppliers and preparing their sourcing project.

Creating a Sourcing Project

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 sourcing project in the **Label** field and the **Agency** for the sourcing project you wish to create.
3. Select the **Commodity** for the sourcing project. Please note when you are searching for a **Commodity**, you can click on the (Ellipsis) icon to perform a detailed search or browse through the list of commodities. Once you have a found the commodity you would like to select, click the checkbox and then click the **Close** button.
4. Click the **Save** button.

Setting Up a Project Team

1. Navigate to the **Setup Team** tab of the solicitation you wish to modify.
2. To add a new team member, enter the name of the individual you wish to add to your project team in the **Add a Contact** field. Please note that the individual you wish to add must have an APP account in order to be added.
3. Select the role(s) that the individual should have:
 - **Project Team:** can view and make changes to the solicitation
 - **Project Team (View Only):** can view the solicitation
 - **Evaluator (Scoring):** can view the solicitation, can be assigned as an official technical and/or functional questionnaire evaluator for the solicitation. This role is usually reserved for the Procurement Officer who is responsible for the solicitation
 - **Evaluator (Non-Scoring):** can view the solicitation, can see responses to the technical and/or functional questionnaires, but cannot score responses. This role is for members of the evaluation committee
4. Click the **Save** button.

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Defining the Project Schedule

1. Navigate to the **Project Schedule** tab of the solicitation you wish to add a project schedule to.
2. Clicking on the **Create from a Template Schedule** button. Clicking this button and adding this template will prepopulate your project schedule with a series of milestone tasks that can be subsequently edited and refined.
3. To manually add a task, click the **Add a Task** button.

The screenshot shows a form for adding a task to a project schedule. On the left, there are several input fields: 'Sourcing Steps' (dropdown), 'Code' (text box with 'T1'), 'Type' (dropdown with 'Action'), 'Manager' (dropdown with 'PRICE Alex'), 'Label' (text box), 'Status' (dropdown with 'Scheduled'), 'Assigned to' (dropdown), 'Description' (text area), 'Parent Task' (dropdown), 'Previous Task' (dropdown), 'Initial Workload' (text box with 'Days'), 'Real updated load' (text box with 'Days'), and 'Progress' (text box with '%'). On the right, there is a table titled 'ADVANCED DATES MGMT' with columns 'Begin date', 'End date', and 'Duration'. The table has three rows: 'Initial', 'Updated', and 'Actual'. Each row has a calendar icon in the 'Begin date' and 'End date' columns and a 'days' label in the 'Duration' column. Below the table is an 'ADD A COMMENT' button.

4. Enter information in the mandatory fields: **Code, Type, Manager, Label, Begin Date, and End Date**. Additional information such as a **Description, Parent Task, or Previous Task** can also be entered.
5. Click **Save & Close** to finish adding the task.



Note: After you have added tasks to your project schedule, you can update progress on the **Project Schedule** tab by clicking on the **Pencil** icon for the task you wish to update. Once you have made your updates, click the **Save & Close** button. All tasks assigned to users will be available on the **My Open Scheduled Tasks** page.

Uploading Project Documents

1. Navigate to the **Setup Documents** tab of the solicitation.
2. To upload a project document, click the **Create a document for this process** button.
3. Select the appropriate document type (e.g., *Bid Security, Determination Documents, etc.*)
4. Enter the **Title** of the document and select the document's **Status**.
5. Attach the project document using the **Click or Drag to add files** button.
6. Click **Save & Close**. Please note that documents on this tab are for internal use only, but can be easily carried over to the **RFx Exhibits** tab.