



Preparing a Sourcing Project


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

Once the sourcing project has been created and configured, Procurement Officers can proceed with identifying suppliers and preparing their sourcing project, which consists of specifying the type of solicitation (IFB, Micro-Purchase, RFGA, RFI, RFQ, RFQual, RFP), the bid due date, the bid opening date, the solicitation publication date (if it being posted on the Public Portal), and uploading any supplier-facing solicitation documents.

Identifying Suppliers

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to edit and then click the  (**Pencil**) icon to open it.
3. Navigate to the **Identify Suppliers** tab.
4. Click the  (**Ellipsis**) icon to search for and select suppliers.
5. The Browse Supplier window has been filtered to only show suppliers that supply the commodity that the solicitation is for. Enter additional search criteria (e.g., Keywords, Veteran Owned Business, etc.) and then click the **Search** button.
6. Click the checkbox(es) for any suppliers you wish to add and then click the **Close** button.
7. Ensure the **Consulted** checkbox for each supplier is checked. This indicates that you intended to invite the supplier to the sourcing project.
8. Click the **Save** button.


Setting up a Sourcing Project

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to edit and then click the  (**Pencil**) icon to open it.
3. Navigate to the **Prepare RFX** tab.
4. Select the **RFX Type**:
 - *IFB*: A formal procurement method seeking competitive sealed bid responses where price is the basis for award.
 - *Micro-Purchase*: Purchase of supplies or services using simplified procedures where the aggregate amount is under the dollar threshold defined in A.A.C. R2-7-D304.
 - *RFI*: A non-binding procurement method seeking input, comments or feedback from potential suppliers prior to the issuing of a solicitation.

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- *RFQ*: An informal procurement method seeking competitive responses when the aggregate amount is under the dollar threshold defined in A.R.S. §41-2535.
 - *RFQUAL*: A formal procurement method seeking to obtain statements of qualifications to be used in a competitive selection process.
 - *RFP*: An informal procurement method seeking competitive responses when the aggregate amount is under the dollar threshold defined in A.R.S. §41-2535.
5. Enter a **Label**.
 6. Select a **Bid Due Date**.
 7. If the solicitation is being posted on the public portal, indicate the publication begin date of the solicitation.
 8. Enter the **Summary** of the solicitation, such as indicating the pre-offer conference dates and times. Whatever is entered in this field will be sent to suppliers.
 9. If necessary, adjust the **Advanced Options** to meet your needs, such as requiring suppliers acknowledge the receipt of the invitation to bid or if suppliers provide their responses in a form instead of a grid.
 10. Click the **Save** button.

Uploading RFX Exhibits

1. From any page in APP, select **Sourcing Projects** from the **Sourcing** drop-down menu.
2. Search for the solicitation you wish to edit and then click the  (**Pencil**) icon to open it.
3. Navigate to the **Prepare RFX** tab.
4. From the **Prepare RFX** tab, click on the **RFX Exhibits** header.
5. Click **Create a Document**. You can also click **Attach from Programs Library** if you would like to attach a document that you previously uploaded on the **Setup Documents** tab.
6. Select the appropriate document type (e.g., *Bid Security*, *Determination Documents*, etc.)
7. Enter the **Title** of the document and select the document's **Status** (typically you should select *Approved* unless the document needs to be reviewed by another member of your solicitation team). You can also enter a description of the document in the **Summary field**
8. Attach the project document using the **Click or Drag to add files** button.
9. Click **Save & Close**.

Note: For instructions on how to setup your questionnaires and item grids, please refer to the *Configuring Questionnaires and Item Grids Quick-Reference Guide*.