

## Creating a Sourcing Project RFX (Step 2)

This document is a reference guide for procurement officers who need to set up a RFX 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/>.

### Set up Project RFX

1. Navigate to the **Setup Team** tab on the left hand side.

The screenshot shows the 'Setup Team' interface. The left sidebar is dark blue with white text. The main area is light gray. At the top, there's a search bar and a title 'Sourcing project: BPM004759 - Treats ABC - Setup Team'. Below the title are 'Save & Close' and 'Save' buttons. The 'Team' section has a 'Select user(s)\*' dropdown. Below it is a table with columns 'Email', 'Profiles', and 'Contact'. One row is visible with email 'adaproc98@azdoa.gov', profile 'Owner', and contact 'PROC98 ADA'. There are trash and add icons for each row.

2. (Optional-Agency dependant) Enter the name of the individual(s) you wish to add to your project team in the **Select user(s)** field. (Note: The **Select user(s)\*** field drop down menu will only have active APP users. For an example, Subject Matter Experts would have to be added at the time of the solicitation to be able to make any changes)
  - a. Click the drop down arrow under **Profiles** to select the profiles the individual should have.
  - b. Then, click **Save**

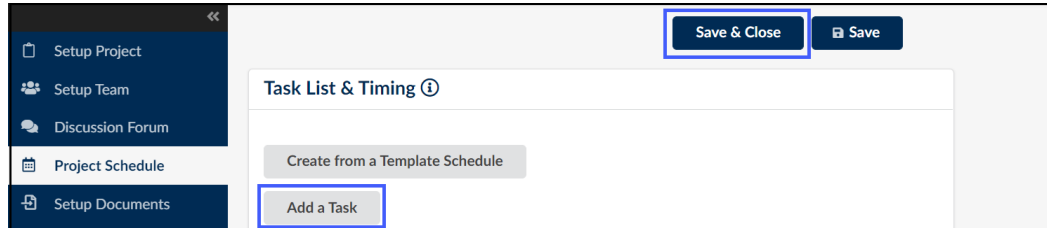
This is a close-up of the 'Team' section. The 'Select user(s)\*' dropdown is highlighted with a blue box. Below it, the 'Profiles' dropdown is also highlighted with a blue box, showing the 'Owner' profile selected. The 'Contact' dropdown is also visible, showing 'PROC98 ADA'.

3. Now, navigate to the **Project Schedule** tab.

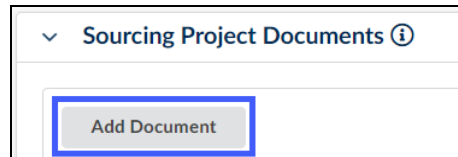
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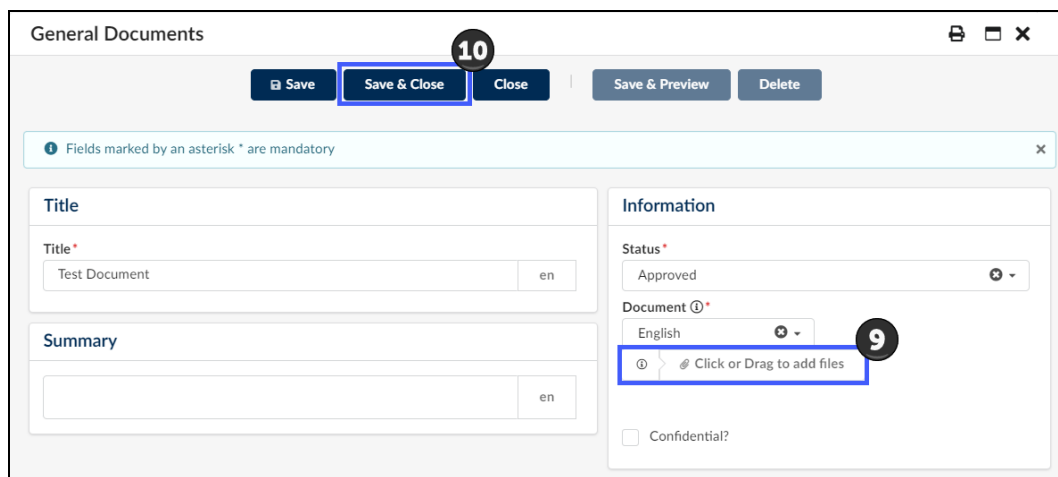
4. (Optional) Click the **add a task** button and enter the fields that pertain to the task if desired.
  - a. Then, click **Save & Close**



5. Navigate to the **Setup Documents** tab on the left hand side.
6. Scroll down and click the **Add Document** button under the "Sourcing Project" Documents section.



7. On the Popup select **Document type**
8. Enter required information
9. Attach required documents using the **Click or Drag** to add files button
10. Once complete, Click **Save & Close**



**Note: Documents uploaded on this tab will not be seen in the public portal, therefore documents not meant to be public should be uploaded on this tab.**