

Completing Add Document & Confidential Tabs

This document is a quick reference guide for users who will complete the Documents and Confidential tabs 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/>.

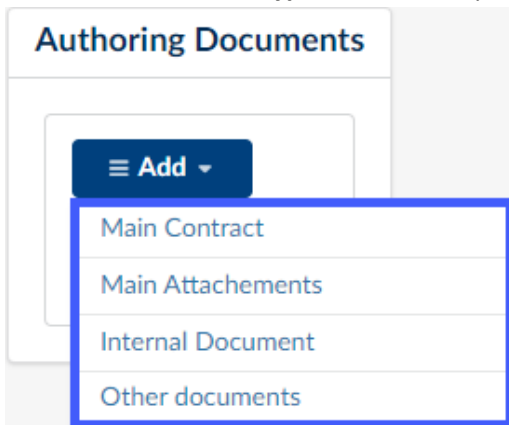
Completing Add Document Tab

Note: Confidential documents will not be uploaded on the Add Document tab, these documents will be uploaded in the Confidential tab. Continue to steps below for this process.

1. Select **Browse Contracts** from the Contracts drop-down menu.
2. Search for the draft contract you wish to edit and then click the Pencil icon to open it.
3. Navigate to the **Add Document** tab.



4. Click the **Add** dropdown.
5. Select the **Document Type** from the dropdown.



6. Complete and/or review the following fields for your document:
 - a. **Document Name** (Required)
 - b. Summary (If applicable)
 - c. **Effective Date/Expiration Date** (Required) - Users are able to mirror the contract start and end dates if unsure on what dates to utilize.
7. Attach the document using the **Click or Drag to add files** button.
8. Click **Save & Close**.

ARIZONA

PROCUREMENT PORTAL

Document

Save Save & Close Close

Document Name* XYZ Document Status Draft Version V1 Effectivity 6

Summary Visible to Supplier Effective Date* 4/1/2022 Expiration Date* 4/1/2025 Notification Period

References

URL

General Documents

File to import 7

Click or Drag to add files

Insurance Documents.pdf

9. Click the **Submit** button to approve the Document.

<input type="checkbox"/>	Document Name	Version	Document Type	Status	Visible to Supplier	Download	Pending Validations	Last Modified Date
<input type="checkbox"/>	Certificate of Insurance	V1	Insurance Documents	Draft	Yes		Submit	1/20/2022

1 Result(s)

10. Repeat the steps above to continue adding documents to your contract.

Note: Confidential documents will not be uploaded on the Add Document tab, these documents will be uploaded in the Confidential tab. Continue to steps below for this process.

Completing Confidential Tab

1. Select **Browse Contracts** from the Contracts drop-down menu.
2. Search for the draft contract you wish to edit and then click the Pencil icon to open it.
3. Navigate to the **Confidential** tab.
4. Click the **Add Confidential Document** button.
5. Complete and/or review the following fields for your document:
 - a. Title
 - b. Revision
 - c. Summary (If applicable)
 - d. Date Fields (If applicable)
 - e. Status = Approved
 - f. Document = English
6. Attach the document using the **Click or Drag to add files** button.
7. Select the **Confidential** Checkbox.
8. Click **Save & Close**.

Confidential Documents

The screenshot shows the 'Confidential Documents' form in the Arizona Procurement Portal. The form is titled 'Confidential Documents' and has a header with buttons for 'Save as draft', 'Save & Close', 'Publish', and 'Delete'. The form is divided into two main sections: 'Title' and 'Information'. The 'Title' section includes fields for 'Title *', 'Revision *', 'Summary', and 'Text'. The 'Information' section includes fields for 'From', 'To', 'Status', 'Notification before Expiration', 'Authorization', 'Order', 'Document', and a 'Confidential?' checkbox. Red callout boxes with numbers 5 through 8 highlight specific elements: 5 points to the 'Information' section header, 6 points to the 'Click or Drag to add files' button, 7 points to the 'Confidential?' checkbox, and 8 points to the 'Save & Close' button.

9. Repeat the steps above to continue adding confidential documents to your draft contract.

Note: The Confidential tab is only visible to the user that is the contract owner defined in the contract tab (by default the user who created the contract). If the contract owner needs to be changed, this can be done on the contacts tab by the current owner.