

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. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

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

1. **Project-Level Templates:** When a procurement user creates a project-level template, they can 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 can 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 Sourcing Project** from the Sourcing drop-down menu.
2. From the Create Sourcing Process page, click the **Is a template** checkbox.
3. Enter a description for the project-level template in the **Label** field.
4. Select the **Sourcing Project Type** (RFX, Spot Bid).
5. Add your Agency
6. Select the **Commodity** for the sourcing project.

The screenshot shows the 'General Information' form with the following fields and callouts:

- Code:** A text input field with callout 3.
- Is a template:** A checked checkbox with callout 2.
- Label*:** A text input field containing 'Chocolates Template' with callout 4.
- Sourcing Project Type*:** A dropdown menu with 'RFX' selected and callout 4.
- Status*:** A dropdown menu with 'In progress' selected.
- Agency*:** A dropdown menu with 'Arizona Department of Administration' selected.
- Division:** A dropdown menu.
- Fiscal Year:** A dropdown menu.
- This is an Emergency Purchase:** An unchecked checkbox with callout 6.
- Commodity*:** A dropdown menu with '|50161511 - Chocolate or chocolate substitute' selected and callout 6.
- Creation Date*:** A date input field with '7/23/2023' entered.
- Procurement Officer:** A text input field.
- Procurement Officer Email:** A text input field.
- Procurement Officer Phone:** A text input field.

7. Click **Save**.
8. Update information across the Setup Project, Setup Team, Project Schedule, Setup Documents, Requirements, and Identify Suppliers tabs as needed.
9. Click **Save**.



To apply a project-level template to a sourcing project, follow these steps:

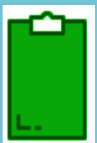
1. From any page in APP, select Sourcing Projects from the Sourcing drop-down menu.
2. Click the Duplicate a Sourcing Project button.
3. Click the drop-down to search for and select the project-level template or previous sourcing project you wish to copy.
4. Click Copy and close.
5. Click Continue on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

Creating an RFx Template

1. Navigate to the **Prepare RFx** tab in the sourcing project you wish to create an RFx Template.
2. In the Setup tab, click the **Save as a Template** checkbox.
3. Update information as applicable across the Setup, RFx Exhibits, Suppliers, Technical questionnaire, Technical evaluation questionnaire, Financial questionnaire, and Items headers on the **Prepare RFx** tab.
4. Click **Save**.

Applying an RFx Template

1. Navigate to the **Prepare RFx** tab of the sourcing project you wish to apply the RFx template.
2. Complete the **RFx types** and **Bid Due Date** fields (do not click Save).
3. Select the **Create from template** button.
4. Search for and select the applicable template. Select what you want to keep unchanged, copy and add, and copy and replace from the template.
5. Click the **Save & Close** button.
6. Click **Continue** on the Warning pop-up to apply the RFx template.



When creating sourcing project templates, it is best not to run them through the sourcing process. This means that the initial sourcing project file you created 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 the sourcing project as a template. You can browse project-level templates on the Sourcing page by clicking the **Is a template** checkbox.

Resources

Click the link below for more information on the Sourcing Project creation processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/source-contract-qrgs-176>