

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

Set up Project RFx

1. Navigate to the **Setup Team** left margin tab.
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.
 - a. Click the drop down arrow under **Profiles** to select the profiles the individual should have.
 - b. Click **Save**.

The screenshot shows the 'Team' setup interface. At the top right, there are 'Save & Close' and 'Save' buttons. Below them is a 'Team' section with a 'Select user(s)*' dropdown menu. Below the dropdown is a table with columns for 'Login', 'Email', 'Profiles', and 'Contact'. A callout '2a' points to the 'Profiles' column, and a callout '2b' points to the 'Save' button. The table contains one row with a trash icon, the email 'sullynna.mvula@azdoa.gov', a dropdown menu with 'Owner' selected, and the name 'MVULA Sullynna'.



The Select user(s)* field drop down menu will only have active APP users. For example, Subject Matter Experts would have to be added at the time of the solicitation to be able to make any changes

3. Click the **Project Schedule** left margin tab.
4. (Optional) Click the **Add a Task** button and enter the fields that pertain to the task in the Edit task pop-up, if desired.
5. Click **Save & Close**. The task(s) displays in the table. Repeat this step for more tasks.



Access the Project Schedule QRG for a step-by-step process to add a project schedule.

6. Click the **Setup Documents** left margin tab.
7. Scroll down and click the **Add Document** button under the “Sourcing Project Documents” section.
8. On the Content editor pop-up, **Select a document type**.
9. Enter required information.
10. Attach required documents using the **Click or Drag to add files** button.
11. Once complete, Click **Save & Close**.



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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>