

Prepare RFx / Items Tab

This document is a quick reference guide for users who will create items for their 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/>.

The Items tab will be used to create items procurement users would like suppliers to bid on. Users can add additional grids, items from the catalog, and upload items from a spreadsheet.

Setting up Items

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. Click on the **Items** tab.
5. To add the first item enter:
 - a. **Code (V)** - a unique identifier for the item
 - b. **Type (V)** - indicates if the item is a Required item, Optional Item, Additional Fee, etc.
 - c. **Label (V)** - a description of the item.

Note: The (V) indicates the field is visible to a supplier.
6. If necessary enter the **Quantity, Reference Price, Unit, Target Price, Commodity**, etc.
Note: Do not under any circumstances remove or modify the columns shaded in gray.
7. Once complete adding an item, click **Save**.

The screenshot displays the 'Setting up Items' interface. At the top, there are buttons for 'Save & Close', 'Save' (highlighted with a red circle 7), 'Forward', 'Send Solicitation for Approval', and 'Other Actions'. Below this is a 'Selected Lot - Round' dropdown menu. The main navigation bar includes 'Setup', 'Technical Questions', 'Technical evaluation questions', 'Financial Questions', 'Financial evaluation questions', 'Items (F)' (selected), 'RFx Exhibits', 'Suppliers', and 'Workflow'. A search bar contains 'Keywords', 'RFP Grid', 'Group(s)', and 'Type' with 'Search' and 'Reset' buttons. Below the search bar are buttons for '+ Add Grid', '+ Add products', 'Export Grids to Excel', 'Import Grids from Excel', and 'Preview'. The 'Response' section features an 'Actions' menu and a table with the following columns: 'Code (V)*' (highlighted with a red circle 5 and a blue box), 'Parent', 'Group(s)', 'Type (V)*' (highlighted with a red circle 5), 'Label (V)*' (highlighted with a red circle 5), 'Qty (V)', 'Order (V)', 'Reference Price', 'Unit (V)' (highlighted with a red circle 6), 'Target Price', and 'Commodity'. The table contains one row with values: '11_1', a dropdown, a dropdown, 'Required Item', 'Item 1', empty, empty, 'Each', empty, and a dropdown. At the bottom left, it says '0 Result(s)'.

- Continue to add items to the grid as necessary, users can simply complete the new item line that appears or select **Add an Item** from the **Actions** drop-down menu.

Response

Actions

Code (V) *	Parent	Group(s)	Type (V) *	Label (V) *	Qty (V)	Order (V)	Reference Price	Unit (V)	Target Price	Commodity
I1_2			Required Item							
I1_1			Required Item	Item 1				Each		

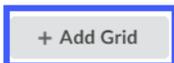
1 Result(s)

- After adding each new item click **Save**.
- Users can utilize the **Preview** button to view the item grids as a supplier would see them.

*Note: Users are also able to create and configure item grids in Excel by clicking on the **Export grids to Excel** button. Users can then create the item on their grid by following the instructions in the Excel sheet. Once complete configuring your item grids users can upload the completed grids to APP by clicking the **Import Grids from Excel** button.*

Adding Grids

- Click the **Add Grid** button to add a new item grid. This will allow you to group alike items in one grid.



- On the popup click **Create Grid**.
- Enter the **Label** for your grid
- Select **[Std_main_grid]** from the **Grid Type** dropdown.
- Enter the **Order** number.
- Once complete, click **Save & Close**.

Grid management

Save **Save & Close** **Save & New**

Label *
New Grid Label en **3**

Grid type *
[std_main_grid] **4**

RFX Grid ###

Description
en

Order *
2 **5**

6

New Grid:

New Grid Label

☰ Actions

Code (V) *	Parent	Group(s)	Type (V) *	Label (V) *	Qty (V)	Order (V)	Reference Price	Unit (V)	Target Price	Deliv. date (V)	Commodity
 I2_1	<input type="text"/>	<input type="text"/>	<input type="text"/> Required Item	<input type="text"/>							

0 Result(s)

7. Users can now add items to their new grid by following the steps previously mentioned.