

Solicitation Amendment - Creating New Rounds

This document is a quick reference guide for users wishing to create a new round for their sourcing project 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/>.

After a solicitation has been created and prepared, there may be times when a new round needs to be created. A new round is typically issued when amendments to the original solicitation are added. All new rounds are treated as a child of the original sourcing project.

Solicitation Amendment/Creating a New Round

1. From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
2. Click the **Pencil** icon to open the solicitation in which the new round will be created.
3. Click the **Prepare RFx** left margin tab.
4. Click the **Other Actions** button and select **Create a new round**.
5. On the Round/Lot copy pop-up, confirm the tabs to be duplicated in the **Copy from selected RFx** column.
6. Click **Create**.

Round / Lot copy

✖ 🖨 📄 ✕

Commodity: 50160000 - Chocolate and sugars and sweeteners and confectionery products

Organization: Arizona Department of Administration

Templates only

RFx types	Lot #	Round #	Label	Begin	End	Status
RFP	1	1	Sourcing Test SM	7/3/2023	7/4/2023	In Evaluation

1 Record(s)

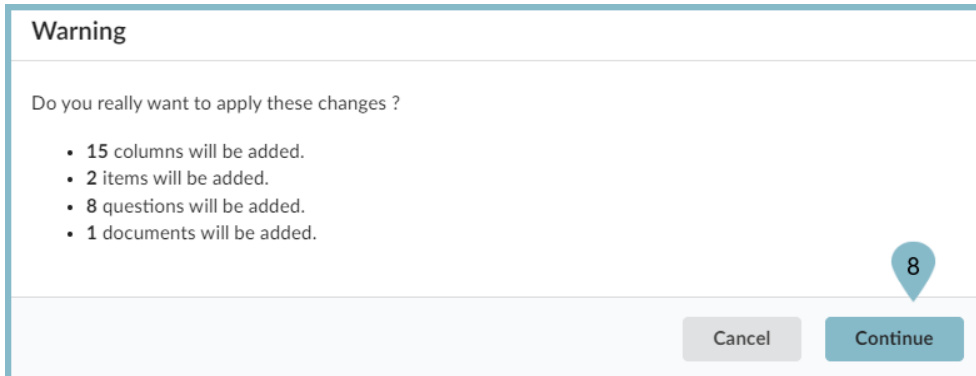
Copy Options

Choose what to copy

	Blank	Default from RFx Type	Copy from selected RFx
Setup Tab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Item Columns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Items	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7. Review the information on the Warning pop-up.

8. Click **Continue**.



Warning

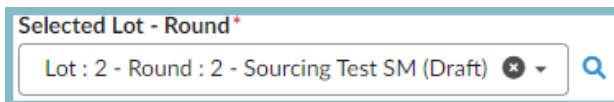
Do you really want to apply these changes ?

- 15 columns will be added.
- 2 items will be added.
- 8 questions will be added.
- 1 documents will be added.

8

Cancel Continue

9. The new round displays.

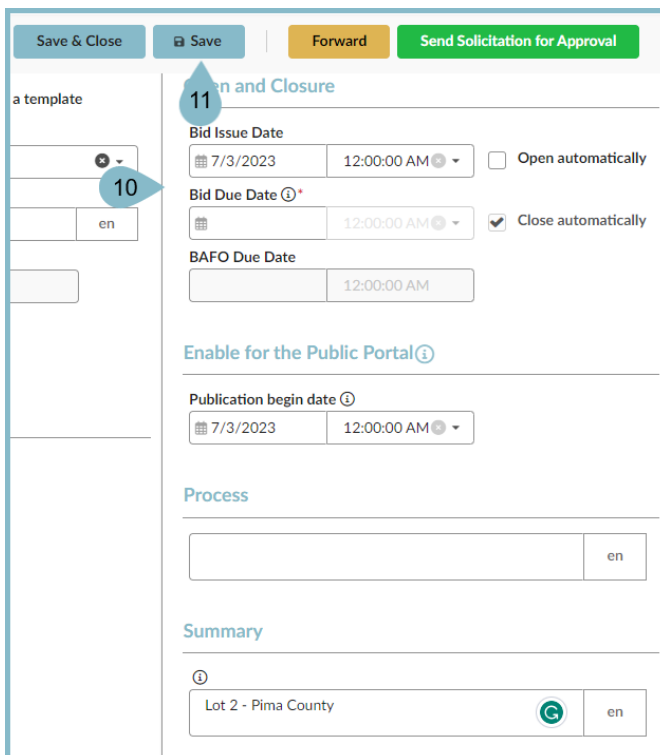


Selected Lot - Round*

Lot : 2 - Round : 2 - Sourcing Test SM (Draft) ✕ 🔍

10. Update the bid dates when applicable.

11. Click **Save**.



Save & Close Save Forward Send Solicitation for Approval

a template

11 **Open and Closure**

Bid Issue Date
7/3/2023 12:00:00 AM Open automatically

Bid Due Date [ⓘ]
 12:00:00 AM Close automatically

BAFO Due Date
 12:00:00 AM

Enable for the Public Portal [ⓘ]

Publication begin date [ⓘ]
7/3/2023 12:00:00 AM

Process
 en

Summary
[ⓘ] Lot 2 - Pima County en

10

12. Click on the **RFx Exhibits** header and upload any new amendment documents.

13. Click the **Suppliers** header and select all suppliers included in the new round. Add any additional suppliers when applicable.
14. Continue to make changes to the solicitation as necessary to capture the details of the new round.
15. Once the new round is updated, click the **Send Solicitation for Approval** button.
16. Click **Send**.
17. Confirm the suppliers for the new round and update the email message.
18. Click **Send and Close**.

The screenshot displays a 'Send to' section with a table of recipients. The table has columns for 'Supplier' and 'User'. One row is selected, showing 'RW&C' as the supplier and 'Murphy Hazel' as the user. Below the table, there is a checkbox for 'Copy all team members'. The 'Email' section below shows a subject line 'A New Solicitation has been Sent' and a body of text starting with 'Dear Supplier, You have been invited to participate in the following solicitation for the Arizona Department of Administration...' followed by a bulleted list of details.

19. Click **OK**, twice.



View previous rounds using the Selected Lot - Round drop-down in the Prepare RFx tab.

The screenshot shows a dropdown menu titled 'Selected Lot - Round *'. The selected option is 'Lot : 2 - Round : 2 - Sourcing Test SM (Draft)'. There is a small icon to the right of the text.

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>