

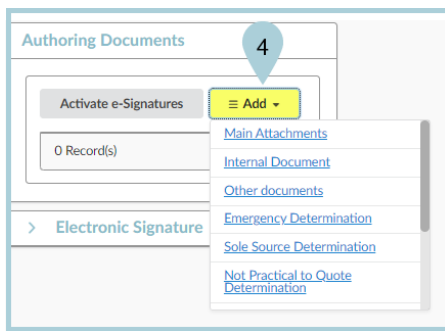
Completing the Add Document and Confidential Tabs

This document is a quick reference guide for users wishing to 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/>.

Confidential documents are not uploaded on the Add Document tab. Instead, they are uploaded in the Confidential tab, as demonstrated below.

Completing the Add Document Tab

1. Select **Browse Contracts** from the Contracts drop-down menu.
2. Search for the draft contract you wish to edit and click the **Pencil** icon to open it.
3. Click the **Add Document** left margin tab.
4. Click the **Add** dropdown in the Authoring Documents section.



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 of what dates to utilize.
7. Attach the document using the **Click or Drag to add files** button.
8. Click **Save**.

The screenshot shows a 'Document' form with the following fields and callouts:

- 6a**: Points to the 'Document Name' field, which contains 'Item Document'.
- 6c**: Points to the 'Effectivity' section, which includes 'Effective Date' (7/10/2023), 'Expiration Date' (7/20/2023), and 'Notification Period' (Days).
- 7**: Points to the 'References' section, which includes a 'File to import' area with a file named 'Insurance Documents.pdf'.

Other visible fields include 'Status' (Draft), 'Version' (V1), 'Summary', and 'Visible to Supplier' (checked). A 'Save' button is located at the top right.

9. Click the **X** icon to close the pop-up.
10. The document displays under Authoring Documents.

The screenshot shows the 'Authoring Documents' table with the following structure:

	Document Name	Version	Document Type	Status	Visible to Supplier	Download	Pending Validations	Last Modified Date
<input type="checkbox"/>	Item Document	V1	Other documents	Approved	Yes			7/11/2023

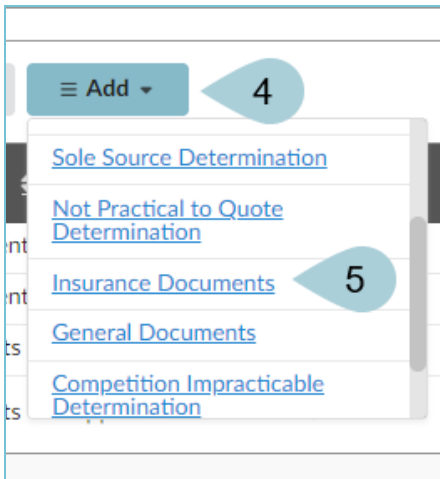
Callout **10** points to the bottom of the table, indicating the document has been added.

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

Uploading Certificate of Insurance

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

4. Click the **Add** dropdown in the Authoring Documents section.
5. Scroll through the document type list and select **Insurance Documents**.



6. The Document Name field is pre-populated with the contract number and "COI".
7. Use the **Coverage Type** dropdown to select the coverage type.
8. Select the applicable **Effective and Expiration Dates**.

 A screenshot of a document form.
 - Step 6: Points to the 'Status' dropdown menu, which is currently set to 'V1'.
 - Step 7: Points to the 'Coverage Type' dropdown menu, which is open and showing a list of options including 'General Liability', 'Auto Liability', 'Workers Compensation', 'Professional Liability E&O', 'Professional Environmental Liability', 'Sexual Abuse & Molestation', 'Pollution Liability', 'Hazardous Waste', 'Technology Errors & Omissions', and 'Network Security & Privacy Liability'.
 - Step 8: Points to the 'Effectivity' section, which contains fields for 'Effective Date*', 'Expiration Date*', and 'Notification Period' (with a 'Day(s)' sub-field).
 Other fields visible include 'Document Name' (pre-filled with 'CTR073127 COI'), 'Summary', and a 'Visible to Supplier' checkbox.


When the COI has multiple policies expiring on different dates, verify that the earliest expiration date is used in the Expiration Date field.
Multiple Coverage Types can be selected when applicable.

9. Upload the document by selecting the **Click or Drag to Add Files** button.

References

URL

References

File to import

Click or Drag to add files 9

10. Select the document you wish to upload from your computer files.
11. Click **Save**.
12. Click **Submit**.
13. The Document Name field is updated to reflect the Effectivity dates and Coverage Type(s) selected.
14. Click the Contract link to go back to the contract.

< ↺ ☆ Document

»

Save

The activity Approve Document has been automatically validated
Validated successfully

Document Name
CTR073127 COI 2025-09-30 GL 13

Status
Approved

Version
V1

Summary

Coverage Type
General Liability

Linked to Contract
[CTR073127 - Sign Language Interpreter for SPO - GOODYEAR TIRE & RUBBER CO](#) 14

Effectivity

Effective Date * 9/1/2024

Expiration Date * 9/30/2025

Notification Period

Day(s)

Completing the Confidential Tab

1. Select **Browse Contracts** from the Contracts drop-down menu.
2. Search for the draft contract you wish to edit and click the **Pencil** icon to open it.
3. Click the **Confidential** left margin tab.
4. Click the **Add Confidential Document** button.

Add Confidential Document

0 Record(s) 4

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**.

The screenshot shows the 'Confidential Documents' form. At the top are buttons: 'Save as draft', 'Save & Close', 'Close', 'Publish', and 'Delete'. The form is divided into several sections:

- Title:** Contains 'Title*' (5a) with the value 'Meeting Notes' and 'Revision' (5b) with the value '1'. Both have a language dropdown set to 'en'. A blue callout '8' points to the 'Save & Close' button.
- Summary:** (5c) A text area for the summary.
- Text:** A text area for additional text.
- Information:**
 - 'From' (5d) and 'To' date pickers.
 - 'Status' dropdown set to 'Approved' (5e).
 - 'Notification before Expiration' field set to '0' Day(s).
 - 'Authorization' dropdown.
 - 'Order' field set to '0'.
 - 'Document' (5f) dropdown set to 'English'.
 - 'Click or Drag to add files' button (6).
 - A file 'EN - Meeting Notes.pdf' is shown with upload and download icons.
 - 'Confidential?' checkbox (7) is checked.
- Contract:** 'Contracts Name' field with the value 'CTR066125 - Treats for SPO'.

9. The document(s) displays under Add Confidential Document.

The screenshot shows the 'Add Confidential Document' section. At the top, it says '0 Selected' and 'Download documents (ZIP)'. Below is a table with the following columns: Title, Att., Contact, Last Modification (UTC-7), Creation Date (UTC-7), Validity End Date, and Version.

	Title	Att.	Contact	Last Modification (UTC-7)	Creation Date (UTC-7)	Validity End Date	Version
<input type="checkbox"/>	Meeting Notes		MVULA Sullynnia	7/10/2023 9:03:16 PM	7/10/2023 9:03:16 PM		1

Below the table, it says '1 Record(s)' (9) and there is a settings gear icon.

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

Resources

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

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