

Prepare RFx/Setup Tab

This document is a quick reference guide for users setting up their solicitation 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/>.

Once a sourcing project has been created, Procurement users will specify the type of request (IFB, Micro-Purchase, RFGA, RFI, RFQ, RFQual, RFP), enter their bid issue date, due date, and publication date on the Setup tab. Users can also provide details on the solicitation process and a summary on this tab.

RFx Setup

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 click the **Pencil** icon to open it.
3. Navigate to the **Prepare RFx** left side tab.
4. Select the **RFx Type**.
5. Verify the **Label**.
6. Enter an **RFP Response Cutoff** (optional) - The discussion forum will close for further questions on the date and time entered in this field.
7. Enter a **Bid Issue Date**.
8. Select a **Bid Due Date**.
9. Select the **Publication begin date** if the solicitation is going to be posted on the public portal.
10. Enter the **Process** and **Summary** of the solicitation, such as indicating pre-offer conference dates and times. Whatever is entered in this field is sent to suppliers. This information is also available on the public portal.
11. Click **Save**.

The screenshot displays the 'Setup' tab of the RFx configuration interface. It is divided into two main sections: 'RFx Settings' on the left and 'Dates' on the right. The 'RFx Settings' section includes fields for Status (Draft), Release Status (Draft), Label (Sourcing Project Test), Lot # (1), Round # (1), and RFP Response Cutoff (12:00:00 AM). The 'Dates' section includes fields for Open and Close, Bid Issue Date (7/2/2023), Bid Due Date (7/7/2023), BAFO Due Date (12:00:00 AM), and Publication begin date (12:00:00 AM). Below these are sections for Process and Summary. A 'Save & Close' button and a 'Save' button are located at the top right. Numbered callouts (4-11) highlight the fields mentioned in the instructions.

12. If necessary, adjust the **Advanced Options** to meet your needs.

▼ **Advanced Options**

- Buyers can change bid due date
- Post to the Public Portal
- Sealed bids
- Suppliers must acknowledge
- Check the presence of a total column grid
- Enable Manage BAFO
- Suppliers can partially bid



The Enable Manage BAFO checkbox cannot be deselected. If you do not conduct a BAFO round, having this checked will not cause a problem.

13. Once complete, click the **Save** button.

Resources

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

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