

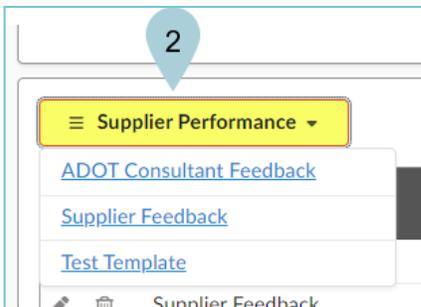
Creating Performance Assessments

This document is a quick-reference guide for supplier managers who need to create performance assessments 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/>.

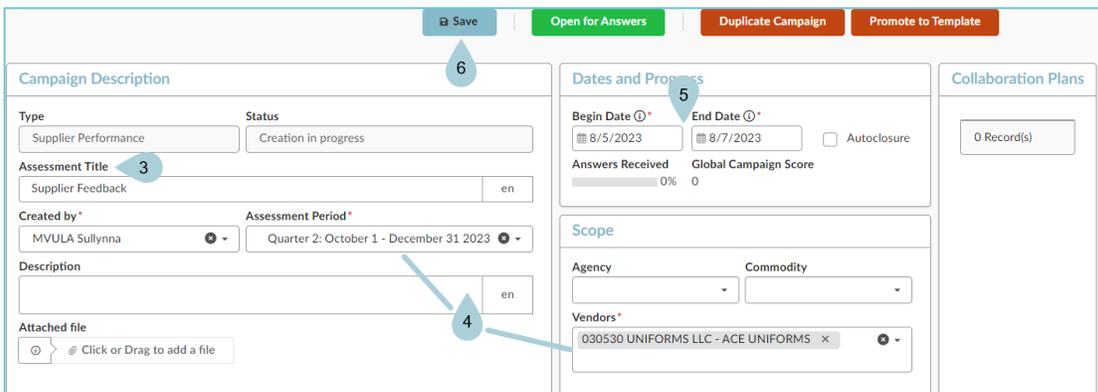
Performance assessments measure the overall performance of a supplier, contract or order. These assessments are measured through the results of questionnaires. These questionnaires are based on templates that are created by SPO. Each question in the questionnaire can have a different weightage based on its level of importance. After creating a performance assessment questionnaire, you can assign it to evaluators who will complete the questionnaire.

Creating Performance Assessments

1. From any page in APP, navigate to the Suppliers drop-down menu and select **Assess Suppliers**.
2. Click the **Supplier Performance** drop-down and select the appropriate template for your assessment. For this example, select the **Supplier Feedback** template, as it is the most common.



3. On the Supplier Performance page, the **Assessment Title** and **Created by** fields populate automatically. The **Assessment Title** field is customizable.
4. Update the **Assessment Period** (period of supplier performance being evaluated) and **Vendor** fields.
5. Select the **Begin Date** and **End Date** you would like to run this questionnaire. The Begin Date is when the Performance Assessment is active and the End Date is when it will close.
6. Click **Save**.



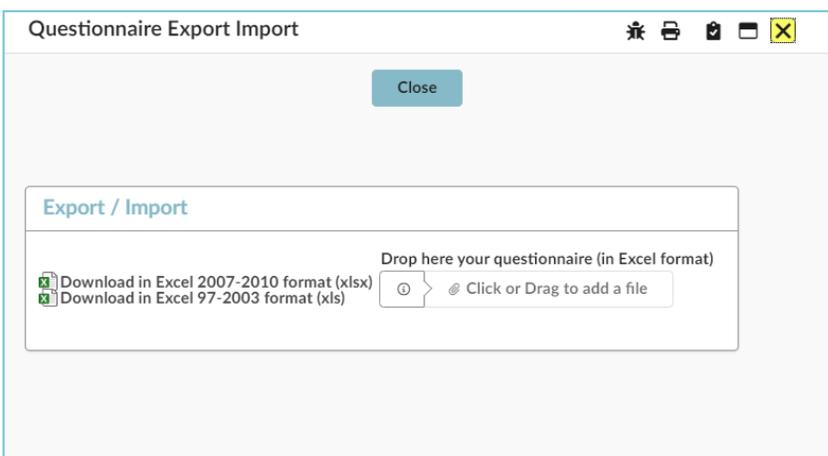
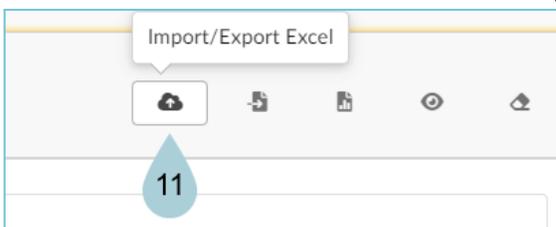
Now, the general information for the questionnaire is populated and we will begin editing the information in

the questionnaire. We will continue from this screen.

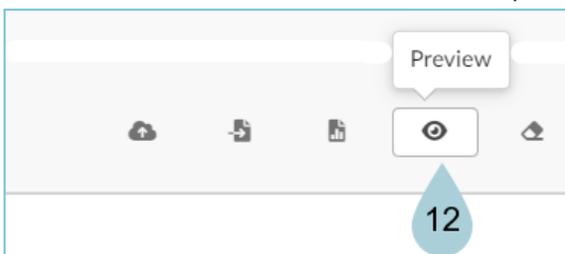
7. Navigate to the **Questionnaire** left margin tab. The Supplier Feedback template displays.
8. Click the pencil for each field you wish to edit.
9. Use the ellipsis to delete, move, or duplicate the question.



10. After clicking the pencil icon, you can customize the **Scoring Mode** and **Scoring Type** for each question.
11. You have the ability to download the questionnaire in Excel, modify it, then upload it back to APP. The downloadable Excel format has detailed instructions on how to modify the questionnaire within Excel. Select the **Download in Excel** button and once you are finished, **Click or Drag to add a file**.



12. Select the **Preview** button to see what the questionnaire will look like.



13. Once you have finalized the questionnaire, select **Save**. At this point, the questionnaire is complete and ready to go. Next, we will add Evaluators to take the questionnaire. We will continue from this screen.
14. Navigate to the Evaluator left margin tab.
15. In the Default Evaluator Rules section, click the **+Add the Rule** button.

16. Complete the Add New Evaluator Rule section with: **The User, or Role, Will answer,** and **For** fields.
17. Click **Save**. Then repeat as needed.

18. You can add evaluators in many ways.
 - Assign a specific evaluator for a subsection by entering both into the rule bar and clicking add role
 - Add evaluator by role on a specific object
 - The grid beneath the rule bar will populate with evaluators selected per section so you are able to see what each evaluator is responsible for
19. Once complete, click the **Open for Answers** button.

Now, evaluators are alerted that they need to complete the questionnaire. Once all questionnaires have been completed, the system automatically calculates the performance score and closes the questionnaire, by the designated end date.

Resources

Click the link below for more information on supplier management processes in APP:

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