

Prepare RFx/Questionnaire Tabs

This document is a quick reference guide for users creating an RFx Questionnaire 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/>.

Procurement users can leverage templates or create ad hoc questions and questionnaires for a supplier's response.

You can download a template to create and configure your technical and/or financial

questionnaires in Excel by clicking the **Import/Export Excel** link  at the top of the Questionnaire Builder page. You can also configure your weighting and scoring by following the instructions on the Excel sheet. After configuring your questionnaire, you can upload the completed questionnaire to APP by clicking the same link. Once you have imported the questionnaire, click the Save & Close button.



You cannot add an attachment to the Excel file. When your questionnaire requires an

attachment, click the pencil  icon to open the question and add the attachment in the Add an Attachment to Question field.

If you choose to upload this way, you do not need to follow the following process listed in this QRG.

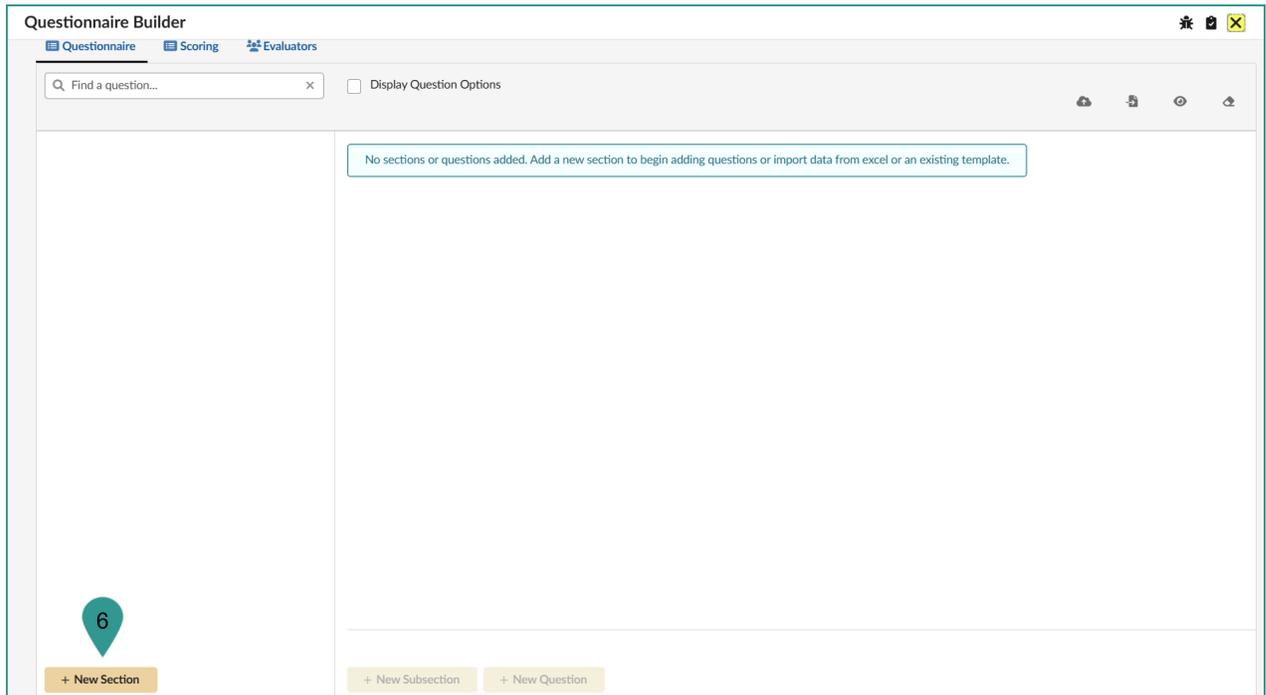
Questionnaire Configuration

1. From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
2. Search for the solicitation you wish to edit, then click the **Pencil** icon to open it.
3. Click the **Prepare RFx** left side tab.
4. Click on the **Technical Questions** or **Financial Questions** section header tab.

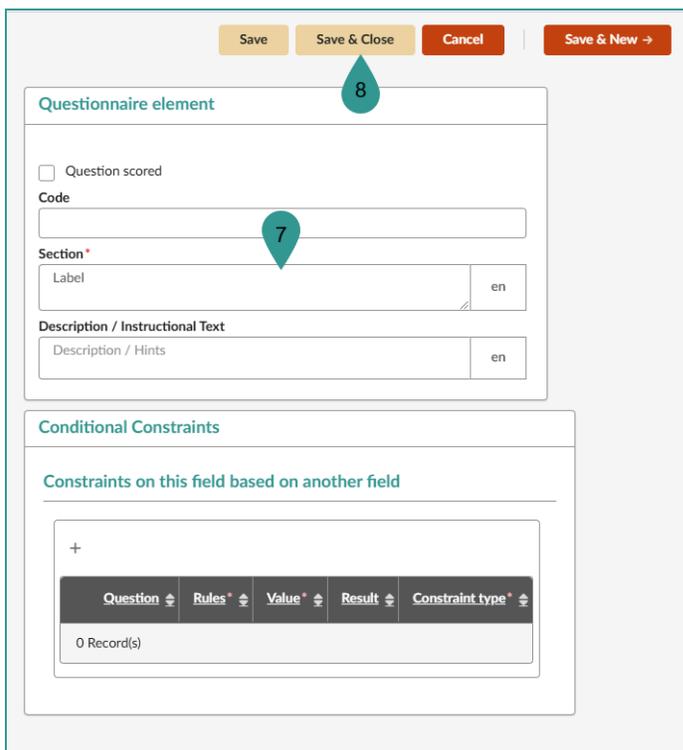


It is advised not to score the technical questions due to scoring weight issues. All scored questions must be created in the Financial Questions tab.

- Click the **Edit Questions & Scoring** button to open the Questionnaire Builder page.
- Click the **+ New Section** button at the bottom of the page to add a section to the questionnaire.



- Fill in the **Section** field, and add a description in the **Description/Instructional Text** when applicable.
- Click **Save & Close**.



9. Click **+ New Question** at the bottom of the page to add a question within the section created.

The screenshot shows the 'Questionnaire Builder' interface. At the top, there are tabs for 'Questionnaire', 'Scoring', and 'Evaluators'. Below the tabs is a search bar with the placeholder text 'Find a question...' and a 'Display Question Options' checkbox. The main area displays a 'Non Scoring Section' with a count of '0'. A message box states 'No sub-sections or questions added in this section.' At the bottom, there are three buttons: '+ New Section', '+ New Subsection', and '+ New Question'. A teal callout bubble with the number '9' points to the '+ New Question' button.



All questions must be under a section. Each section is a separate tab on the questionnaire when the supplier is responding.

10. Complete the **Answer Type** & **Field Label** fields.

Answer Type Options	
Text	The supplier responds with one word or sentence.
Long Text	The supplier responds with multiple sentences.
Numeric	The supplier responds with a number.
Date	The supplier responds with a date.
Attachment (Single File)	The supplier attaches one file as their response.
Attachments (Multiple Files)	The supplier attaches multiple files as their response.
Selector	Allows the supplier response to be limited to the option the procurement officer selects, i.e. commodity.
Supplier Document	A form of business validation for document types.



Depending on the Answer Type selected, you may need to add values.

11. Indicate if the question will be scored by selecting the **Question scored** checkbox.
12. Use the **Add an Attachment to Question** field to add any attachments to a question for the supplier to review/sign.

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

- 11**: Points to the 'Answer Type' dropdown menu, which is currently set to 'Text'.
- 10**: Points to the 'Question scored' checkbox, which is checked.
- 12**: Points to the 'Add an Attachment to Question' field, which includes a file upload icon and the text 'Click or Drag to add a file'.

Other visible fields include 'Code', 'Field Label*' (with a language dropdown set to 'en'), and 'Description / Instructional Text' (with a language dropdown set to 'en'). At the top of the form are buttons for 'Previous', 'Save', 'Save & Close', 'Cancel', and 'Save & New'.

13. Scroll down to the Advanced Properties section and complete all applicable fields.
14. In the Scoring Parameter section, select **Numeric** or **Select Value** from the **Scoring Mode** dropdown, and enter **value** or **Stars** from the **Scoring Type** dropdown, when applicable.
15. Complete the **List of Possible Values** section if your question type is List of Values.
16. Scroll further down to apply conditional constraints in the **Conditional Constraints** section. This allows you to have questions appear depending on the answer to a previous question.
17. Once complete, click the **Save & Close** or the **Save & New** button to continue adding to the questionnaire as necessary.

Scored Questions

1. Click the **Evaluators** header.
2. Click the **+ Add the Rule** button and assign yourself to evaluate the entire questionnaire from **The User** or **Or Role** dropdown in the Default Evaluator Rules section.
3. Assign yourself to evaluate individual sections of the questionnaire by selecting yourself from the **Evaluators** dropdown in the Evaluators Assigned section.
4. Click **Save**.



The Scoring Evaluator role is typically reserved for the Procurement Officer who is responsible for the solicitation and facilitating the evaluation committee. While there is a non-scoring evaluator role, you cannot select an individual to access the solicitation unless they have a procurement role in their profile. This is why it is recommended that only a procurement officer be assigned an evaluator role in the system. When scoring the evaluation, a question cannot be scored a zero, it will not be accepted by the system.

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>