

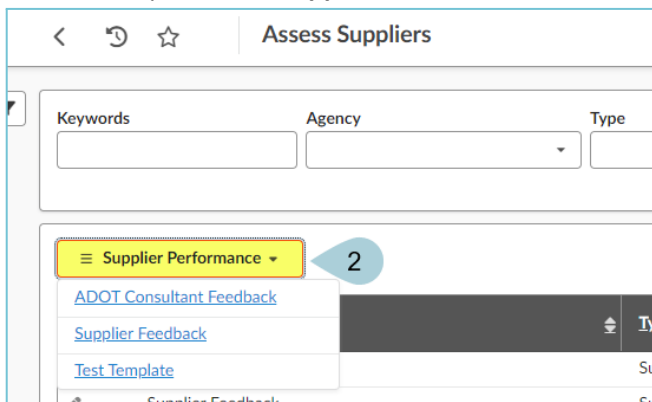
# Managing Performance Assessment Templates

*This document is a quick-reference guide for SPO users who need to manage, create and modify performance assessment templates in the Arizona Procurement Portal (APP.) If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov). Additional resources are also available on the SPO website: <https://spo.az.gov/>.*

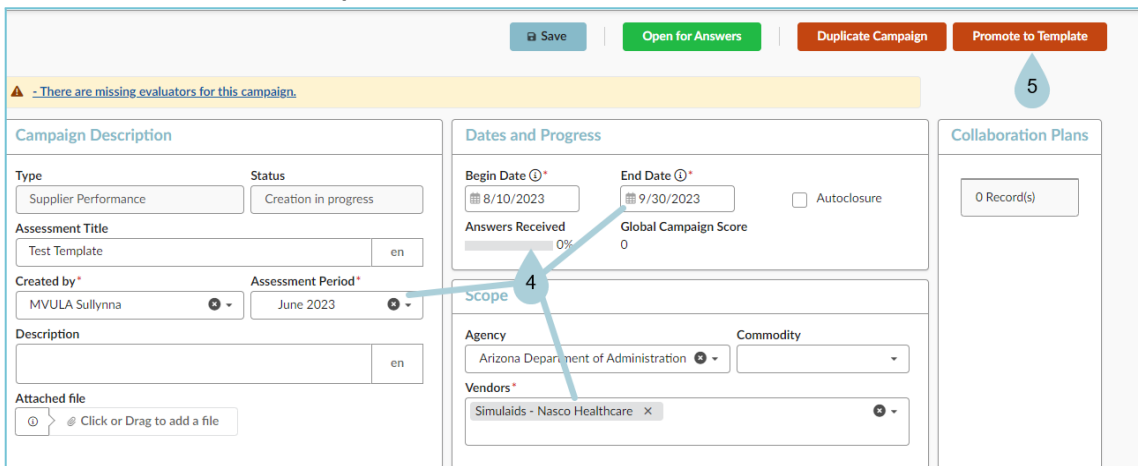
By default, there are 2 existing performance assessment templates. Members of the SPO are the only ones who can create or modify a performance assessment template. You can either modify an existing template and promote it to a new template, or you can create a new template from scratch.

## Creating a New Performance Assessment Template from an Existing Template

1. From any page in APP, navigate to the **Suppliers** drop-down menu and select **Assess Suppliers**.
2. Click the dropdown for **Supplier Performance** and choose the existing template you wish to modify.

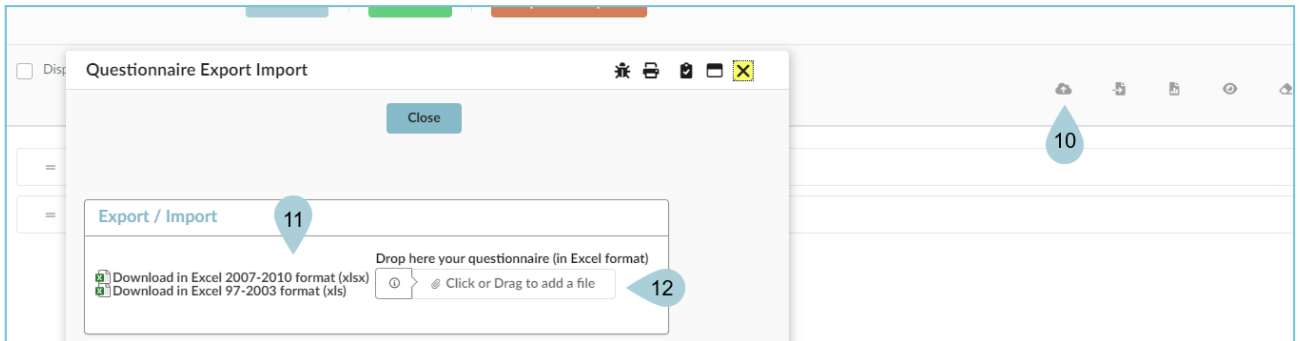



3. You are redirected to the Supplier Feedback page.
4. Complete the **Assessment Period**, **End Date**, and **Vendors** fields.
5. Click on the **Promote to Template** button.

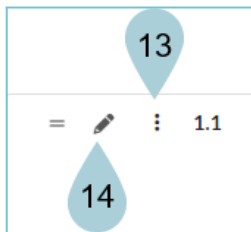


- You are redirected to the template creation page. Change the **Assessment Title** to your desired title. You can modify the **Agency** if you need to define the scope for the template.

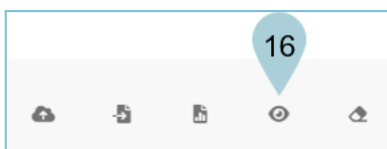
- Click **Save**.
- Navigate to the **Questionnaire** left margin tab to edit your questionnaire template.
- You have the ability to download the questionnaire in Excel, modify it, then upload it back to APP. The downloadable Excel format has detailed instructions on how to modify the questionnaire within Excel.
- Select the **Import/Export Excel** link.
- Select the **Download in Excel** button.
- Once you are finished editing the Excel sheet, **Click or Drag to add a file** to upload it to APP.



- If you want to edit the questionnaire in the system, you can click each field to edit the title. You can use the three ellipses to **delete**, **move**, or **duplicate** the question.
- Use the **pencil**  icon to edit.



- After clicking edit, in the **Scoring Parameter** section, you can customize the **Scoring Mode** and **Scoring Type** for each question.
- Select the **Preview** button to see what the questionnaire will look like. Once you have finalized the

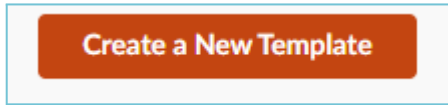


- Once you have finalized the questionnaire, select **Save**.
- Select **Submit**.
- Select **Activate** to activate the template and allow agencies to access it

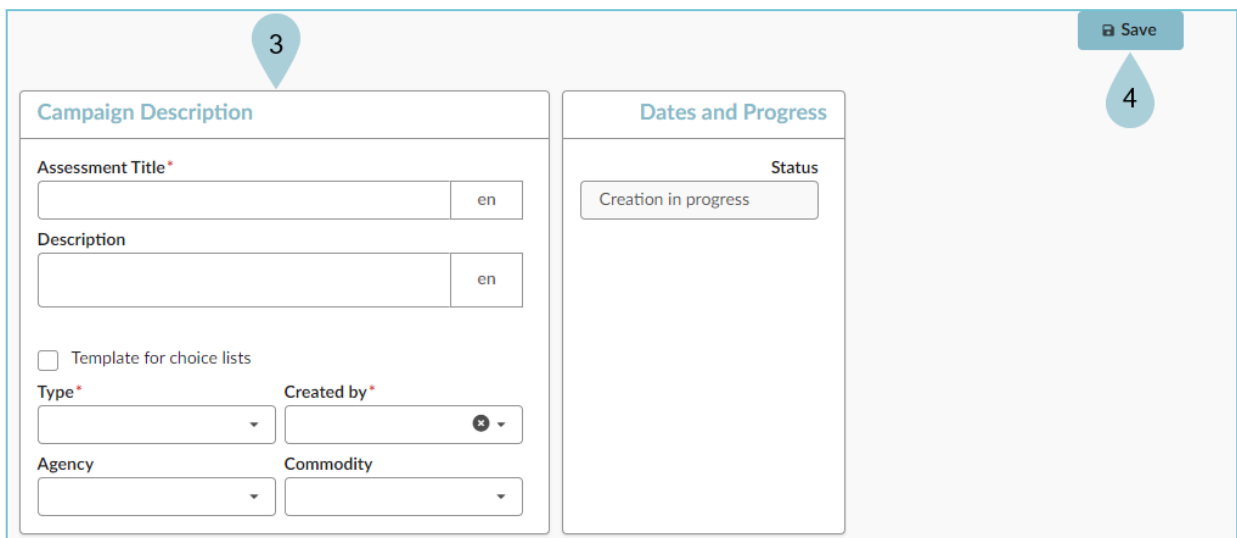
Now, this template is available for the authorized agencies to use when creating a performance assessment.

## Creating a New Performance Assessment Template

1. From any page in APP, navigate to the **Config** drop-down menu and select **Questionnaire Templates**.
2. Select **Create a New Template**.



3. In the Campaign Description section, enter the **Assessment Title** and select the **Type** of assessment it will be. You can modify the **Agency** and **Commodity** if desired.
4. Select **Save**.



5. Navigate to the **Questionnaire** left margin tab and upload or modify your questionnaire in the APP system. Refer to the *“Creating a New Performance Assessment Template from an Existing Template QRG, completing steps 7-10 for more details on editing the questionnaire.*
6. Once you have finalized the questionnaire, select **Submit**.
7. Select **Activate** to activate the template and allow agencies to see it for use.

Now, this template will be available for the authorized agencies to use when creating a performance assessment.

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## 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-grgs>