

Requirements Tab (Internal Questionnaire)

This document is a quick reference guide for procurement users who would like to use the Arizona Procurement Portal (APP) to gather sourcing project requirements. 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 Officers have the ability to create assessment questionnaires that can be sent out to internal stakeholders in order to gather requirements for a solicitation. Once any assessment questionnaires have been responded to, Procurement Officers can review the responses to draft the requirements for the solicitation.

Please note that creating requirements questionnaires in APP is not required and using this functionality is at the discretion of each sourcing project.

Creating a Requirements Questionnaire

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 **Requirements** tab.
4. Enter the **Assessment Title**.
5. Enter the **Begin** and **End dates** for the assessments. These are the dates in which you would like the assessment questionnaires to be completed within. You can also check the **Autoclosure** checkbox if you would like the assessment to automatically close the responses after the end date.
6. If desired, enter a description in the **Description** field.
7. Enter your name in the **Created By** field.

8. If desired, enter details regarding the assessment in the **Needs Overview** and **Technical or Functional Prescription and/or Specifications** fields.
9. Click the **Save** button.
10. Click on the **Questionnaire** header.

ARIZONA

PROCUREMENT PORTAL

Gen. Info **Questionnaire** Assessments Workflow Comparison

11. Click the **+Add a line** to add to the questionnaire. *Please note that configuring this questionnaire is the same as creating technical/financial questionnaires.*
12. Indicate the **Type** (Section, SubSection, Text, List of Values, etc.) *Please note all questionnaires are required to have at least one section.*
13. Enter the **Section/Question**.

| Row/Answer Type* | Section/Question* | Required | Answer List | Multi-Answer | Respondents |
|------------------|---------------------|-------------------------------------|--------------------------|--------------------------|-------------|
| Section | Section One | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Text | Enter Question Here | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

14. Click the **Save** button and continue adding to the questionnaire as necessary.
15. Depending on the **Type** that was selected you may need to **Add values** in the **Answers** column. *Please note that you cannot add values or reorder the questionnaire until you have clicked the **Save** button.*
16. Assign your respondents to each section by selecting them from the **Assign** dropdown within the **Default Respondents Rules** window, then click the **+Add the Rule** button. (Repeat as necessary to add all respondents).

Default respondent rules

For: All Sections

Assign: SMITH John

Or: A role

+Add the Rule Re-execute Rules

17. Next Click **Save**
18. Click the **Open for Answers** button when you are ready to send your questionnaire to the assigned respondents. After this button is clicked your assigned evaluators will receive a notification indicating they have been asked to complete a requirements questionnaire. You can check the status of their responses at any time and send reminders on the **Assessments** header.

Note: You are also able to create and configure your questionnaires in Excel by clicking on the **Download in Excel 2007-2010 format (xlsx)** link at the top of the page. You are then able to create your questionnaire by following the instructions in the Excel sheet. After you have finished configuring your questionnaire you can then upload the completed questionnaire to APP by clicking the **Click or Drag to add a file** button.

Completing a Requirements Questionnaire

- From the APP homepage, open the requirements questionnaire from the **My Pending Validations** window

| My pending validations 15 Results | | |
|--|----------------|--|
| Workflow | Activity | Object |
| Answers | Initialization | Test Assessment - Sweet Treats 2/2/21 JSJ |

by clicking the questionnaire link.

- Navigate to the questionnaire section and answer all required questions.
- Once you are complete answering the questionnaire's questions, click the Submit button.

Questionnaire's answer: Test Assessment

Overview Section One Submit

Section One

Enter Question #1

Answer

Answer 1

Enter Question #2

Answer

2/12/2021

Reviewing a Requirements Questionnaire

- From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
- Search for the solicitation you wish to view and click the **Pencil** icon to open it.
- Navigate to the **Requirements** tab.
- Click on the **Assessments** header.

Gen. Info
Questionnaire
Assessments
Workflow
Comparison

- Click the **Pencil** icon to open the questionnaire and view responses.

| <input type="checkbox"/> | Questionnaire survey | Evaluator | Progress | Status | Last reminder |
|--------------------------|---|------------|--|--------------------|---------------|
| <input type="checkbox"/> | Pencil Test Assessment | Smith John | <div style="width: 100%; height: 10px; background-color: green;"></div> 100% | Review in progress | |

1 Result(s) ⚙️

- After reviewing the responses click the **Approve** button at the top of the popup. *Please note the Send back to Creator button can be used to send the questionnaire back to the respondent.*
- Once complete with the requirements questionnaire, click the **Terminate** button.

Terminate

Note: If you had multiple responses you can compare them on the **Comparison** tab.