

Prepare RFX / Questionnaire Tabs

This document is a quick reference guide for users who will create 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 suppliers to respond to.

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 and then click the Pencil icon to open it.
3. Navigate to the **Prepare RFX** tab.
4. Click on the **Technical Questions** or **Financial Questions** tab.
Note: The Technical Questions tab can be used to have suppliers upload licenses or other items they must have or show capability to provide in order to proceed to the scoring portion of the solicitation. It is not advised to have scoring questions in both the technical and financial envelopes because the system will provide an average score between the two envelopes which would impact the weight of each question..
5. Click the **Plus icon** to add a line to the questionnaire.
6. Indicate the **Type** (Section, Sub Section, Text, List of Values, etc.)
Note: All questions must be under a section. Each section is a separate tab on the questionnaire when the supplier is responding.
7. Enter the **Section title and/or Question**.
8. Indicate if the question requires mandatory response.
9. Indicate if the question will be scored.
Note: Sections cannot be scored. When the section is selected as the type it will not allow the scored checkbox to remain once saved.
10. Click the **Save** button and then continue adding to the questionnaire as necessary.
Note: If you make changes to a question or add a question and you don't hit Save, the changes will not save if you leave that tab.

Copy	Row/Answer Type*	Section/Question*	Required	Answer List	Multi-Answer	Question scored
	Section	Section One	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
	Text	Provide a brief overview of business operations, with an emphasis on experience in regard to the scope of work.	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

0 Result(s)

11. Depending on the **Answer Type** that was selected you may need to **Add values** in the **Answers** column.
Note: Users cannot add values or reorder the questionnaire until you have clicked the Save button.

12. To apply conditional constraints select the Edit icon. This will allow you to have questions appear depending on the answer to a previous question.
13. As you complete your questionnaire, click the **Preview** button to view the questionnaire. Click the **Save** button when you have completed your questionnaire.
*Note: You can also click the **Copy From** button to copy a previously created questionnaire or use a template.*

14. Click on the **Technical evaluation questions** or **Financial evaluation questions** header.
15. Configure the **Weight** of each section as necessary. Be sure to click the **Save** button to have the system automatically recalculate the percentage.
16. Select a **Scoring Mode** of **Numeric** or **Select Value** for each question.
Note: When scoring the evaluation, a question cannot be scored a zero, it will not be accepted by the system.
17. Select a **Scoring Type**, **Stars** or **Enter Value** from the dropdown or select **Add Values** for each question.

Questionnaire Configuration

Copy	Row/Answer Type*	Section/Question*	Scoring Mode	Scoring Type*	Weight*	%	Evaluators
	Section	Section One			1	100%	
	Text	Provide a brief overview of business operations, with an emphasis on experience in regard to the scope of work.	Numeric	Stars	1	50%	
	List of values	Are you located in Arizona?	Numeric	Enter value	1	50%	

3 Result(s)

18. Assign yourself to evaluate the entire questionnaire by selecting yourself from the **Assign** dropdown and clicking the **+Add the Rule** button. The Scoring Evaluator role is typically reserved for the Procurement Officer who is responsible for the solicitation and facilitating the evaluation committee. The **For** dropdown should read **All Sections** unless the evaluator is assigning roles.
Note: 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.

ARIZONA

P R O C U R E M E N T P O R T A L

*Note: You are also able to create and configure your technical and/or financial 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 and configure your weighting and scoring 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. Additionally you can export existing questionnaires to use as templates on other RFX projects.*