


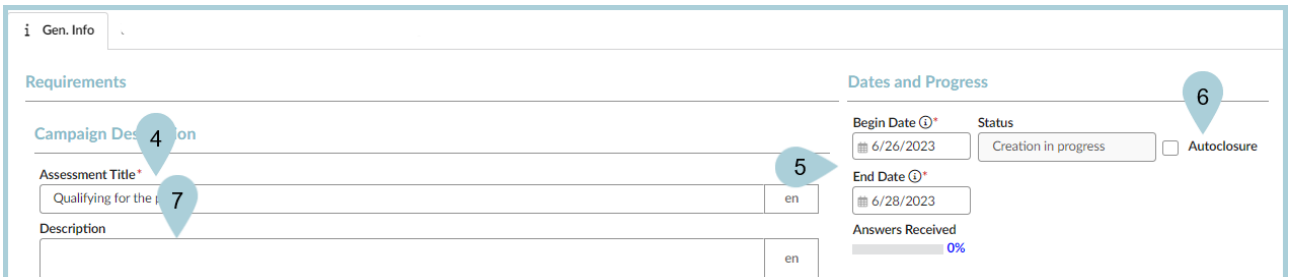
Requirements Tab (Internal Questionnaire)

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/>.

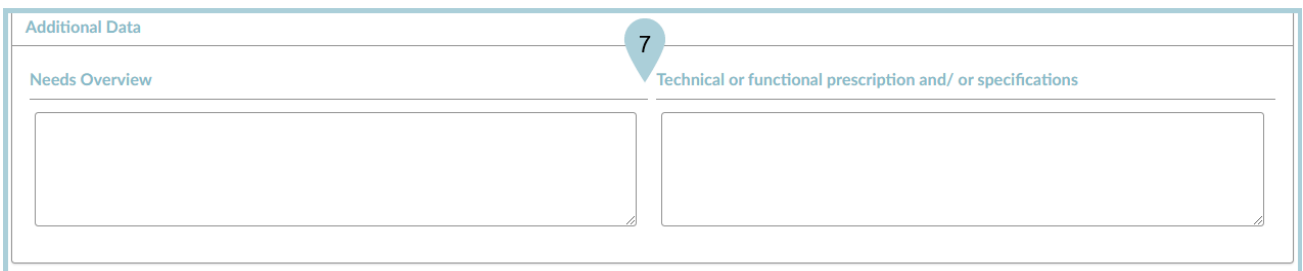
Procurement Officers can create assessment questionnaires that can be sent to internal stakeholders to gather requirements for a solicitation. Once any assessment questionnaires have been responded to, Procurement Officers can review the responses to draft the requirements for the solicitation. Creating 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 in the left margin.
4. Enter the **Assessment Title**.
5. Enter the **Begin** and **End dates** for the assessments. You would like the assessment questionnaires to be completed on these dates. You can also check the **Autoclosure** checkbox if you would like the assessment to close the responses after the end date automatically.
6. If desired, enter a description in the **Description** field.

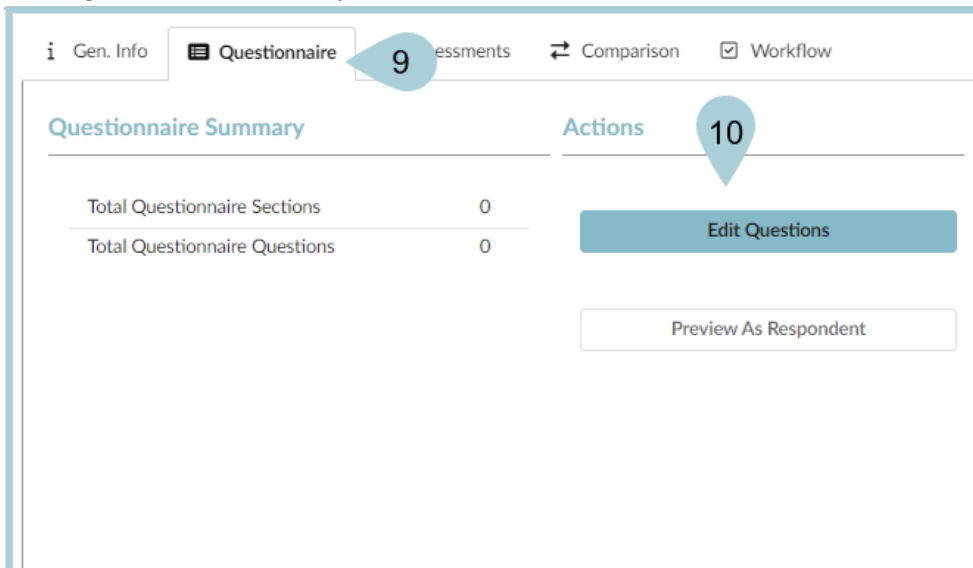


7. If desired, enter details regarding the assessment in the **Needs Overview** and **Technical or functional prescription and/or specifications** fields.

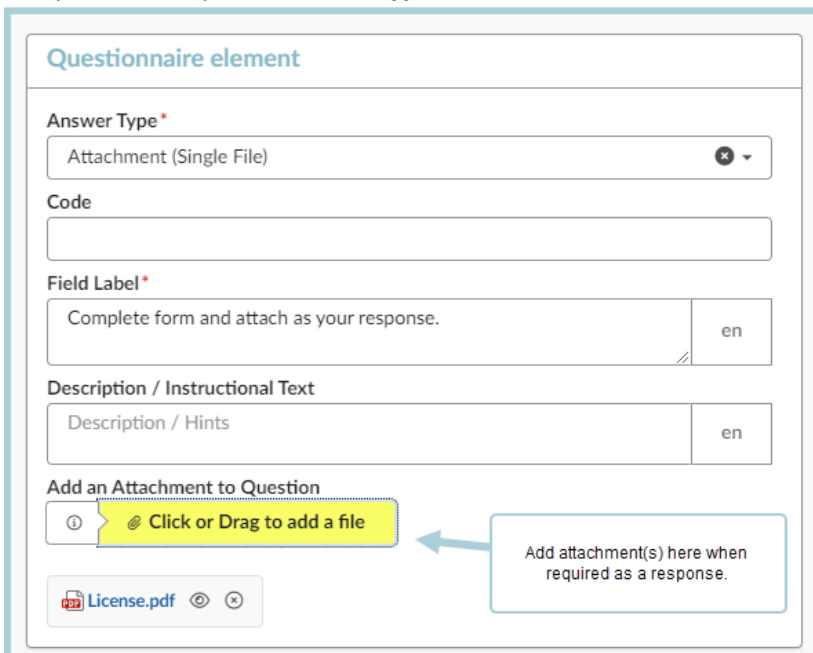


8. Click **Save**.

9. Click on the **Questionnaire** header.
10. Click the **Edit Questions** button to add to the questionnaire. Configuring this questionnaire is the same as creating technical/financial questionnaires.



11. All questionnaires are required to have at least one section. Click the **+New Section** button at the page's bottom to enter the section.
12. Add the name in the **Section** field.
13. Add a description when applicable.
14. When complete, click **Save & Close**.
15. Click the **+New Question** button at the page's bottom to add a question to each section.
16. Complete the required **Answer Type** and **Field Label** fields.



17. Depending on the **Answer Type** selected, more details may be required.

18. Select the **Required** checkbox in the Advanced Properties section if the question is required.
19. When complete, click **Save & Close**.
20. Add additional sections/questions as needed.
21. Assign your respondents to each section by clicking the Respondents header tab.



The respondent is the one who answers the section/subsection questions.

22. In the Default Respondents Rules section, click the **+ Add the Rule** button and select a respondent from **The User**, or, **Or Role** dropdown.
23. Assign which section(s) the respondent will answer in the **Will Answer** dropdown.

The screenshot shows the 'Default Respondent Rules' configuration interface. At the top right, there are tabs for 'Questionnaire' and 'Respondents'. Below the title, there are three buttons: '+ Add the Rule', 'Reset Rules', and 'Clear All'. A callout '21' points to the 'Respondents' tab. Below the buttons is a section titled 'Add New Respondent Rule' with a callout '22' pointing to the '+ Add the Rule' button. This section contains two dropdown menus: 'The User:' (set to 'MVULA Sullynna') and 'Or Role:' (set to 'select role...'). Below these is a 'Will answer:' dropdown menu with a callout '23' pointing to it. The dropdown is open, showing 'all sections/subsections' and 'Section One'. A 'See All' link is visible below the dropdown options.

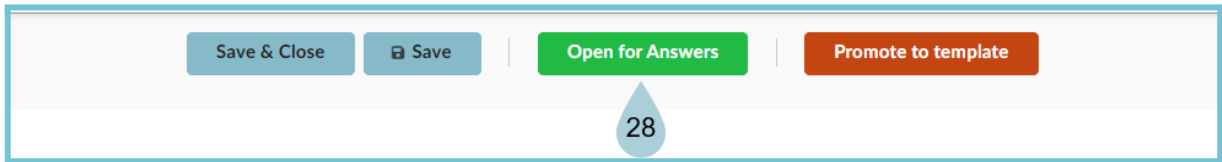
24. Click **Save**.
25. The selected respondent displays in the **Default Respondent Rules** and the **Respondents Assigned** sections.

The screenshot shows the 'Default Respondent Rules' and 'Respondents Assigned' sections. The 'Default Respondent Rules' section has a callout box around a rule: '1. Sullynna MVULA will answer the questions of All Sections'. Below this is the 'Respondents Assigned' section, which includes search filters for 'Keywords' and 'Users', and checkboxes for 'Missing evaluators' and 'Manual Changes'. A 'Search' button and a 'Reset' button are also present. Below the search filters is a 'Change User(s)' dropdown. At the bottom, there is a table with the following data:

Type	Section	Respondents
Section	Section One	MVULA Sullynna

At the bottom left of the table, it says '1 Record(s)'.

26. Click the X in the top right corner to close the pop-up.
27. You are now back on the Sourcing Project page.
28. Click the **Open for Answers** button at the top of the page when you are ready to send your questionnaire to the assigned respondents. After this button is clicked, your assigned evaluators 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.



Complete a Requirements Questionnaire

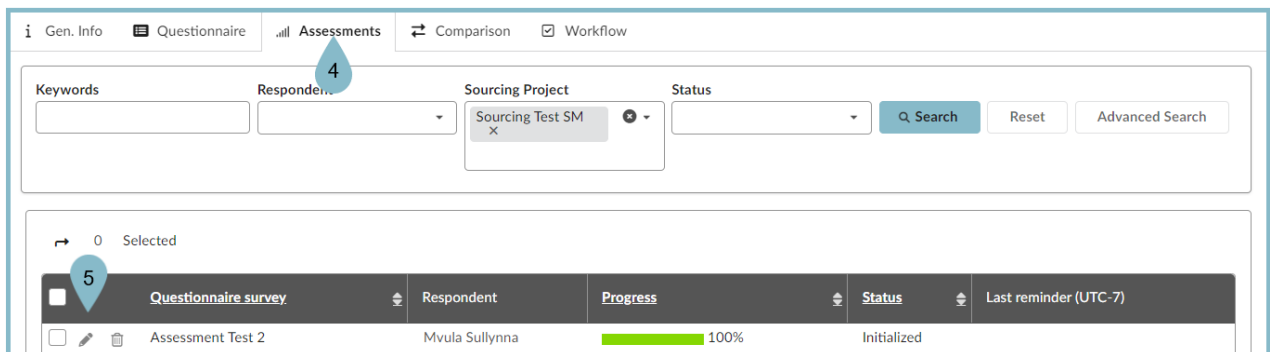
1. From the APP landing page, open the requirements questionnaire from the **My pending validations** window by clicking the questionnaire link.
2. Navigate to the questionnaire section and answer all required questions.
3. Click **Submit**.

 A screenshot of a questionnaire interface. The title is "Questionnaire's answer : Assessment Test". On the left is a sidebar with "Overview" and "Section One" (1/1). A blue callout bubble with the number "2" points to the "Section One" item. The main area shows "Section One" and a question "Where are you located?" with an answer field containing "Scottsdale". A blue callout bubble with the number "3" points to the "Submit" button in the top right corner.

4. Click **OK**.
5. Click **Close**.

Reviewing 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 view and click the **Pencil** icon to open it.
3. Navigate to the **Requirements** left margin tab.
4. Click on the **Assessments** header.
5. Click the Pencil icon to open the questionnaire and view responses.



6. After reviewing the responses click the **Approve** button at the top of the popup.



The Send back to Creator button can be used to send the questionnaire back to the respondent.

7. Once complete with the requirements questionnaire, click the **Terminate** button.



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

Resources

Click the link below for more information on the Sourcing Project processes in APP:

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