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

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. 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. Select **Score Supplier** and choose the existing template wish to modify.
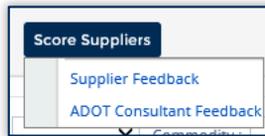

3. You will be redirected to the existing template. Select **Promote to Template**.

4. You will be 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.
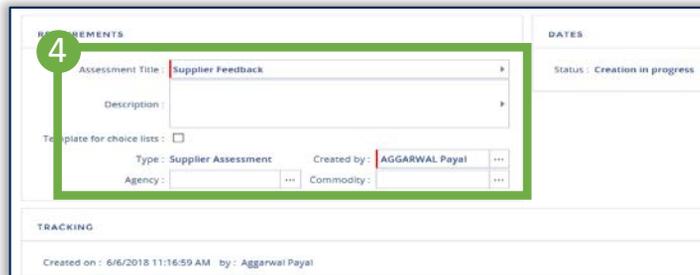
5. Navigate to the **Questionnaire** tab to edit your questionnaire template.
6. You have the ability to download the questionnaire in Excel, modify it, then upload it back to APP. The downloadable Excel format **has detailed instructions** on how to modify the questionnaire within Excel. Select the **Download in Excel** button and once you are finished, **Click or Drag to add a file**.

1
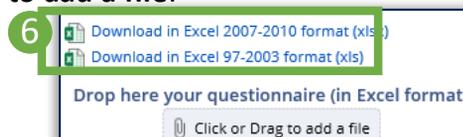
Creating a New Performance Assessment Template from an Existing Template (continued)

7. If you want to edit the questionnaire in the system, you can click each field to edit the title. You can use the buttons on the left to delete, move, edit or duplicate the question.

	Type	Section/Question		Scoring Mode	Scoring Type
Section		Total costs of doing business		▸	
Scoring question		Did costs stay at or under cost expectations?		▸ Select Value ▾	Custom List

8. Under **Scoring Module** and **Scoring Type,** you can customize how each question will be scored.

	Type	Section/Question		Scoring Mode	Scoring Type
Section		Total costs of doing business		▸	
Scoring question		Did costs stay at or under cost expectations?		▸ Select Value ▾	Custom List

9. Select the **Preview** button to see what the questionnaire will look like.
10. Once you have finalized the questionnaire, select **Submit**.
11. Select **Activate** to activate the template and allow agencies to access it.

[🖫 Save | Activate | Duplicate Template]

Now, this template will be 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 **Configure Questionnaires**.
2. Select **Create a New Template.**
3. Enter the **Assessment Title** and select the **Type** of assessment it will be. Here, you can modify the **Agency** and **Commodity** if desired.

REQUIREMENTS

Assessment Title :

Description :

Template for choice lists : ☐

Type :   Created by : AGGARWAL Payal ···

Agency : ···   Commodity : ···

4. Select **Save.**
5. Navigate to the **Questionnaire** tab and upload or modify your questionnaire in the APP system. Refer to "Creating a New Performance Assessment Template from an Existing Template – Steps 6-9" for more details on editing the questionnaire.

Creating a New Performance Assessment Template

7. Once you have finalized the questionnaire, select **Submit**.
8. Select **Activate** to activate the template and allow agencies to see it for use.

[Save] | [Activate] | [Duplicate Template]

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