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

Configuring Questionnaires and Item Grids

This document is a quick-reference guide for procurement users who would need to create and configure technical and/or financial questionnaires and item grids for solicitations 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. Procurement users can configure which questions are mandatory as well as create both technical and financial questionnaires, and depending on the type of RFx, can also set up evaluation criteria for each questionnaire.

In addition to adding questionnaires, the procurement users will also fill in the line items that they want the vendor to bid on the item grid. As part of adding line items to the item grid, the displayed columns are configurable and certain fields can be made mandatory.

Configuring Technical and Financial Questionnaires

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 questionnaire** (or Financial questionnaire) header.
5. Click the **Plus** icon to add to the questionnaire.
6. Indicate the **Type** (*Section, Sub Section, Text, List of Values,* etc.)
7. Enter the **Section/Question**.
8. Indicate if the section/question is mandatory and/or scored (scored questions have a direct correlation to the answer of the question and the score given in the evaluation).
9. Click the **Save** button and then continue adding to the questionnaire as necessary.
10. Depending on the **Type** that was selected you may need to **Add values** in the **Answers** column. Note that you cannot add values or reorder the questionnaire until you have clicked the **Save** button.
11. As you complete your questionnaire, click the **Preview** button to view the questionnaire. Note that you can also click the **Copy From** button to copy a previously created questionnaire or use a template. Click the **Save** button when you have completed your questionnaire.
12. Click on the **Technical evaluation questionnaire** (or Financial evaluation questionnaire) header.
13. Configure the **Weight** of each section as necessary. Be sure to click the **Save** button to have the system automatically recalculate the **%.** Refer to the next page for details regarding section weighting.

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> ⚠️ **Note:** As part of the configuring questionnaires, Procurement Officers have the opportunity to configure the weighting of the questionnaires based on each question/section's importance. When adjusting the weighting for a questionnaire, Procurement Officer should change the weighting value in relation to how much they want that question/section to be emphasized. Note that weighting will always sum to 100% - i.e., no need to do math! Please refer to the following example:
>
> **Example:** If **Question 1** and **Question 2** were both twice as important as **Question 3**, they would have a weighting of 2, while **Question 3** would have a weighting of 1.
>
> | Question | Weighting | Percentage |
> |----------|-----------|------------|
> | Question 1 | 2 | 40% |
> | Question 2 | 2 | 40% |
> | Question 3 | 1 | 20% |

14. Configure the **Weight** of each section as necessary. Be sure to click the **Save** button to have the system automatically recalculate the **%.**
15. Select a **Scoring Mode** of *Numeric* for each question.
16. Select a **Scoring Type** *(Stars, Slide, Enter Value)* for each question.
17. Assign yourself to evaluate the entire questionnaire by selecting *Scoring Evaluators* from the **A role** field at the top of the page and then clicking the **Add the Rule** button. As previously mentioned, the Scoring Evaluator role is typically reserved for the Procurement Officer who is responsible for the solicitation and facilitating the evaluation committee. This role must be assigned on the **Project Team** tab to the Procurement Officer who is responsible for the solicitation.

Note: You are also able to create and configure your technical and/or financial questionnaires in Excel by clicking on the **Download in Excel 207-2010 format (xlsx)** link at the top of the page. You are then able to create your questionnaire and configuring 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.

Defining Item Grids

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 **Items (F)** header.
5. Click the **Add grid** button to add an section to the item grid.
6. Enter the **Label** and **Order** for the section and then click **Save & Close.**
7. Enter the first item's**:**
   - **Code (V)** – a unique identifier for the item
   - **Item types (V)** – indicates if the item is required, optional, additional fees, etc.
   - **Label** – a description of the item

Note that (V) indicates the field is visible to a supplier

1. If necessary enter the **Quantity, Reference Price, Target Price, Parent, Items, Delivery Date** and/or **Commodity** and then click the **Save** button.
2. Continue to add items to the gird as necessary by selecting **Add an Item** from the **Actions** drop-down menu. You can use the **Preview** button to see what the item grids would look like to a supplier.

Please refer to the below screenshot for a sample item grid:
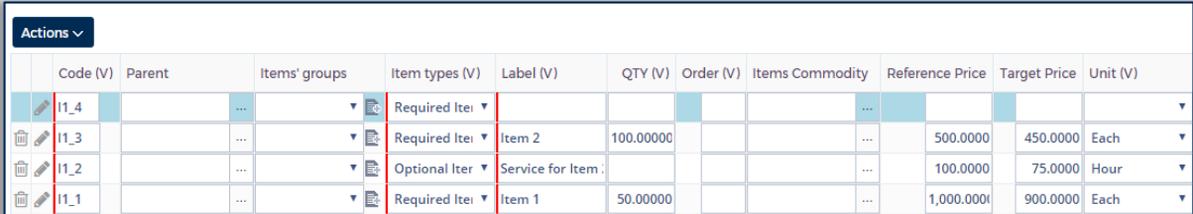
	Code (V)	Parent	Items' groups	Item types (V)	Label (V)	QTY (V)	Order (V)	Items Commodity	Reference Price	Target Price	Unit (V)
✎	I1_4		... ▼	Required Item ▼				...			▼
🗑✎	I1_3	...	▼	Required Item ▼	Item 2	100.00000		...	500.0000	450.0000	Each ▼
🗑✎	I1_2	...	▼	Optional Item ▼	Service for Item			...	100.0000	75.0000	Hour ▼
🗑✎	I1_1	...	▼	Required Item ▼	Item 1	50.00000		...	1,000.0000	900.0000	Each ▼

Note: You are also able to create and configure your item grids in Excel by clicking on the **Export grids to Excel** button the top of the page. You are then able to create your item grids by following the instructions in the Excel sheet. After you finished configuring your item grids you can then upload the completed questionnaire to APP by clicking the **Import Excel grids** button.