

Gathering Sourcing Project Requirements

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 then 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. Enter your name in the **Created By** field.
7. If desired, enter details regarding the assessment in the **Needs Overview** and **Technical or Functional Prescription and/or Specifications** fields.
8. Click the **Save** button.
9. Click on the **Questionnaire** header.
10. Click the **Plus** icon to add to the questionnaire. Please note that configuring this questionnaire is the same as creating technical/financial questionnaires.
11. Indicate the **Type** (*Section, Sub Section, Text, List of Values, etc.*)
12. Enter the **Section/Question**.
13. Indicate if the section/question is mandatory and/or scored.
14. Click the **Save** button and then 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. Note that you cannot add values or reorder the questionnaire until you have clicked the **Save** button.

(continued on next page)

Creating a Requirements Questionnaire

16. Assign your evaluators to each section by clicking the ellipsis icon in the **Evaluators** field for each section and then click the **Save** button.
17. Click the **Open for Answers** button when you are ready to send you questionnaire to the assigned evaluators. After this button is clicked your assigned evaluators will receive a notification that have been asked to complete a requirements questionnaire. You can check the status of their evaluation at any time and send reminders on the **Evaluations** header.

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 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

1. From the APP homepage, open the requirements questionnaire from the **My Pending Validations** window. It will have a **Process of Answers** and an **Action of Initialization**.
2. Click on the  (**Pencil**) icon to open the questionnaire.
3. Answer the questions that have been assigned to you. Once you are done answering the questionnaire's questions, click the **"Submit"** button.

Reviewing a Requirements Questionnaire

1. From the APP homepage, open the completed requirements questionnaire from the **My Pending Validations** window. It will have a **Process of Questionnaire** and an **Action of Closure**.
2. Click on the  (**Pencil**) icon to open the questionnaire. Alternatively, you could have navigated the **Questionnaire** header on the **Requirements** tab of your sourcing project.
3. Review the completed questionnaires on the **Evaluations** tab. If you had multiple responses you can compare them on the **Comparison** tab.
4. Click the **Terminate** button to close the requirements questionnaire.