

Exporting a Questionnaire

You may find it easier to review supplier responses to the questionnaire you are examining by exporting their responses from CalUsource into an Excel file. Page two of this guide provides some of the advantages of using Excel to review supplier questionnaire responses. **Important Note:** Once you have reviewed the exported questionnaire, you must go back into CalUsource and enter your scores.

Export an RFX Questionnaire

1. Click the **Response Workbench** icon on top of RFX home page.
2. Review the Summary Suppliers' Responses on the **Response Workbench** screen.
3. Click **Select Suppliers** icon.
4. Select all the Suppliers you would like to evaluate.
5. Click **Done**.
6. Select **Questionnaire Summary**.
7. Click **Compare**.
8. Click the **Download** Icon in the top right to download the Questionnaire.

The image illustrates the steps for exporting a questionnaire through the CalUsource interface. It features a main screenshot of the 'RESPONSE WORKBENCH' for 'SARA'S WORKSPACE' and two inset screenshots. The main screenshot shows a navigation bar with a 'Response Workbench' icon (1), a 'Select Suppliers' icon (3), and a 'Compare' button (7). Below the navigation bar are summary cards for 'Documents' (2 Price Sheets, 2 Questionnaires), 'Invited Suppliers' (5 Invited, 3 Responded), 'Evaluators' (5 Invited, 0 Responded), and 'Baseline Spend' (USD 465,796.00). A 'QUESTIONNAIRE SUMMARY' tab is selected, and a 'Compare' button is highlighted with a yellow box and callout 7. An inset screenshot shows the 'Select Suppliers (3)' dialog with three suppliers selected: 'Higher Educations entertainment', 'Vogue Entertainment', and 'Daffodil Planter Garden Center'. The 'DONE' button is highlighted with a yellow box and callout 5. Another inset screenshot shows the 'COMPARE - COMPANY INFORMATION' screen with a 'Download' icon highlighted with a yellow box and callout 8.

Advantages of Viewing Supplier Responses in the Exported Questionnaire file

- Excel shows suppliers response to each question side by side (in columns). This makes it easy to review and compare supplier responses with one another.
- Excel displays the entire supplier question response, as opposed to CalUsource, where you have to hover over the first line of the question to see a popup displaying the entire responses.
- You can print out the Excel file, and review it on paper and take notes