Quick Reference Guide
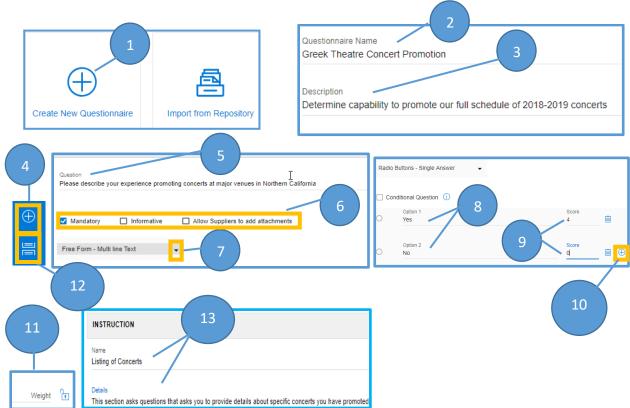
CALUSOURCE
Collaborative Procurement

Adding Questionnaires and Questions

Use the RFX event **Questionnaires** section you to ask questions of suppliers to help you decide on the best supplier to do business with.

Creating Questionnaires and Questions

1. Click **Create New Questionnaire**.
2. Type a brief title of your event in the **Questionnaire Name** field.
3. Type a more complete description of the product or service in the **Description** field.
4. Click the **+** icon to add a question. (Click this icon for each question you add.)
5. Type your question text in the **Question** field that displays after you click the **+** icon.
6. Click the boxes to make a question **Mandatory**, **Informative** and/or **Allow Suppliers to add attachments**.
7. Click the arrow to display all question types, then click on a question type to select it.
8. Some question types ask you to type in answer options.
9. Assign a score value to each answer option using a scale of 0 to 4.
10. Click the **+** icon to add more answer options.
11. You can assign a weight to mandatory questions.
12. Click the **Section** icon to organize your questions under sections. (Optional)
13. Complete the **Instruction** fields to provide instructions on how to respond to the questions in this section.

Create New Questionnaire

Import from Repository

Questionnaire Name
Greek Theatre Concert Promotion

Description
Determine capability to promote our full schedule of 2018-2019 concerts

Question
Please describe your experience promoting concerts at major venues in Northern California

☑ Mandatory   ☐ Informative   ☐ Allow Suppliers to add attachments

Free Form - Multi line Text

Radio Buttons - Single Answer

☐ Conditional Question ⓘ

Option 1
Yes

Score
4

Option 2
No

Score
0

Weight

INSTRUCTION

Name
Listing of Concerts

Details
This section asks questions that asks you to provide details about specific concerts you have promoted

14. Click **Save** periodically to save the questions you have entered,
15. Click **Done** when you are finished. This closes the questionnaire window and returns you to the same RFX document.
    Note: If your question weights do not equal 100, a message will display that you will have to adjust the weights before publishing.

| CANCEL | SAVE | DONE |

14   15

(Continue to next page for additional instructions on adding conditional questions and importing questionnaires)

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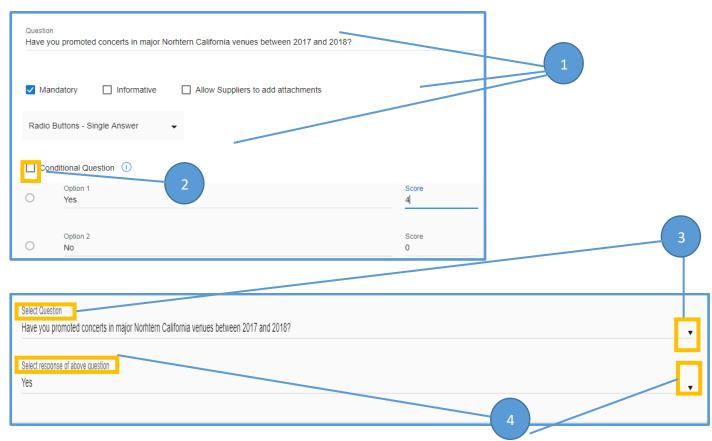### Adding Conditional Questions

On occasion, you may need to create a question that has additional follow up questions that will display depending on how a supplier responds to the initial (parent) question. These follow up questions are called a "conditional questions". The "Conditional Question" check box will be greyed out until a parent question is created. Checking the Conditional Question checkbox allows you to connect a conditional question to a parent question.

1. Add the parent question using steps 4 through 9 in Creating Questionnaires and Questions above.
   Note: The parent question type must include answer options.

2. Add the conditional question using the same steps as described in step 1, then click the **Conditional Question** box.
   Note: There are no restrictions on the question type for conditional questions.

3. Use the drop down arrow in the **Select Question** field to select the parent question that will cause the conditional question you just created to display.

4. Select the specific question response to the parent question that will result in the conditional question being displayed.
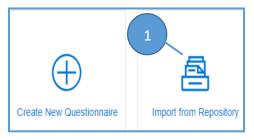
Question
Have you promoted concerts in major Norhtern California venues between 2017 and 2018?

☑ Mandatory   ☐ Informative   ☐ Allow Suppliers to add attachments

Radio Buttons - Single Answer ▼

☐ Conditional Question ⓘ

	Option 1	Score
○	Yes	4
○	Option 2 No	Score 0

Select Question
Have you promoted concerts in major Norhtern California venues between 2017 and 2018?

Select response of above question
Yes

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Importing a Questionnaire from the Repository

An alternate approach is to import an existing CalUsource questionnaire from the repository to use as is or to edit.

1. Click **Import from Repository**.
2. Check the box of the questionnaire you want to import.
3. Click **Import.**