



# Best Practices: Loading Contracts

October 2019

# Webinar Purpose

- Understand why we load contracts
- Share tips and tricks when loading contracts

# Agenda

- Webinar Purpose
- Loading Presigned Agreements: Benefits & Risks
- Loading Presigned Agreements: Best Practices
- Demo: Best Practices



# CalUsource Contracts Importance in Lifecycle Management

# Benefits of Loading Contracts

- Automated notices
- Search and report
- Boost collaboration and visibility
- Audit Trail
- Keeps stakeholders informed
- House all pertinent information in a central location

# Risks of Not Loading Contracts

- Data loss from employee attrition
- No ability to search by key attribute
- No automation for expirations
- Extremely difficult manual reporting
- (UC only) Failure to meet 2017 State Auditor's charge
- Conflicting and competing clauses
  - Most commonly litigated contract dispute

# Best Practices when Loading Contracts

1. Search for the supplier in CalUsource BEFORE contract negotiations
2. Adopt a standard naming convention
3. Assign key campus stakeholders in the “**Contract Sponsor**” field
4. Attach documentation in the “**Notes & Attachments**” section
5. Build custom notifications for non-expiry related reminders

If competitively bid:

6. Flip sourcing event to contract to link documents together

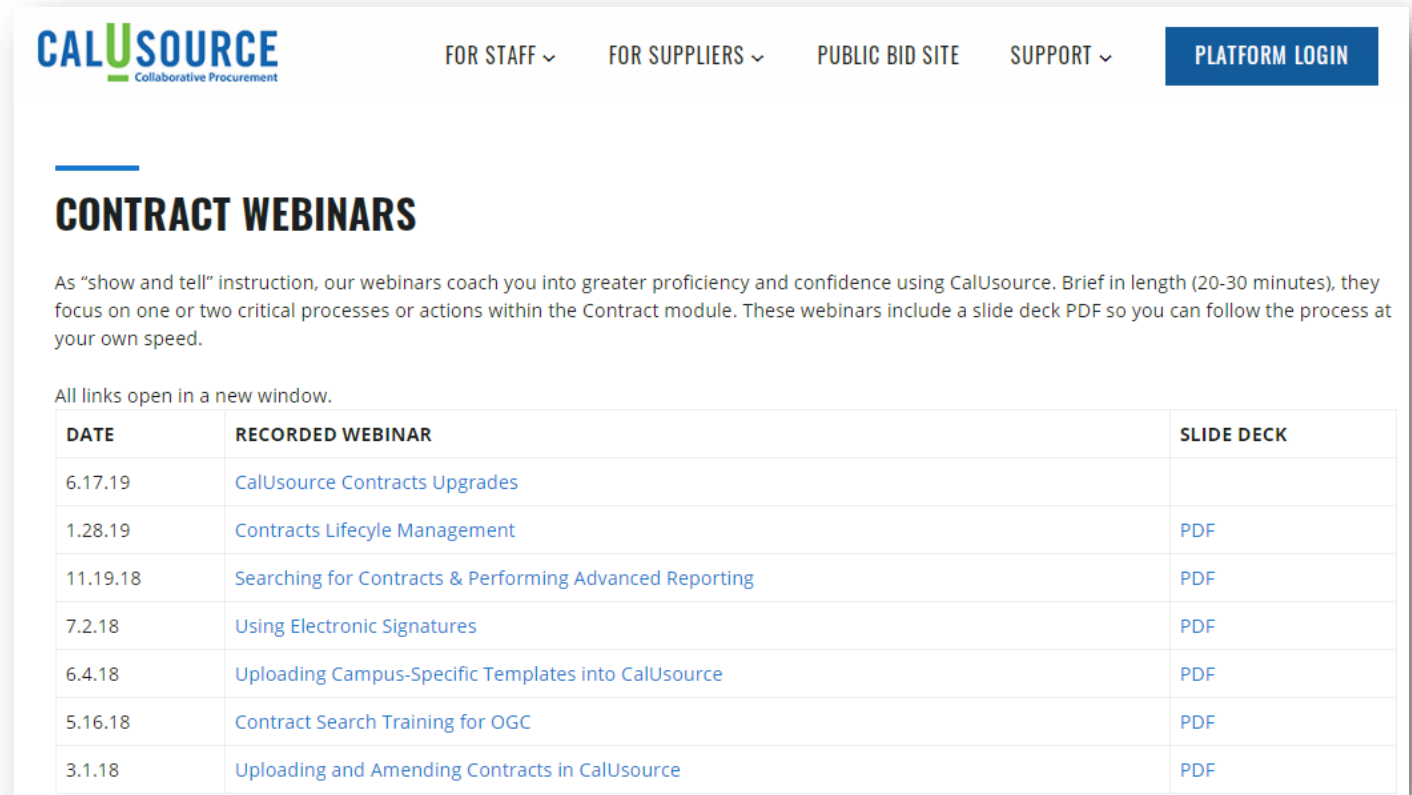
# Best Practices when Loading Contracts

## **Site Demonstration**



# Available Resources

- Webinar Recording
- Slide Deck



The screenshot shows the CalUsource website header with navigation links: FOR STAFF, FOR SUPPLIERS, PUBLIC BID SITE, SUPPORT, and a PLATFORM LOGIN button. Below the header is a section titled 'CONTRACT WEBINARS' with a blue underline. The text describes the webinars as 'show and tell' instruction, 20-30 minutes long, focusing on critical processes. Below the text is a note that all links open in a new window, followed by a table listing webinar recordings and their corresponding slide decks.

DATE	RECORDED WEBINAR	SLIDE DECK
6.17.19	<a href="#">CalUsource Contracts Upgrades</a>	
1.28.19	<a href="#">Contracts Lifecycle Management</a>	PDF
11.19.18	<a href="#">Searching for Contracts &amp; Performing Advanced Reporting</a>	PDF
7.2.18	<a href="#">Using Electronic Signatures</a>	PDF
6.4.18	<a href="#">Uploading Campus-Specific Templates into CalUsource</a>	PDF
5.16.18	<a href="#">Contract Search Training for OGC</a>	PDF
3.1.18	<a href="#">Uploading and Amending Contracts in CalUsource</a>	PDF



Questions?