CALUSOURCE

Collaborative Procurement

Sourcing & Contracts Enhancements

April 2019

Table of Contents

CalUsource Sourcing & Contracts Enhancements

Enhancement Guide Overview

The CalUsource Enhancements Guide is intended to serve as a resource to inform you of monthly updates and enhancements to the tool. This guide is not intended to be a comprehensive training guide, but rather is a way to communicate new functionality to existing CalUsource users.

April 2019 Enhancements

In this month, the following new features have been rolled out to CalUsource:

Sourcing

- Conditional Questions Sub-Numbered According to Parent Question
- RFx – Timeline Section Enhancement
- Edit Question Information Using Rich Text Editor
- Ability to Upload Multiple Questionnaires via Template
- Supplier Preview
- Ability to Upload Multiple Guidelines in One Instance
- Supplier Response Download

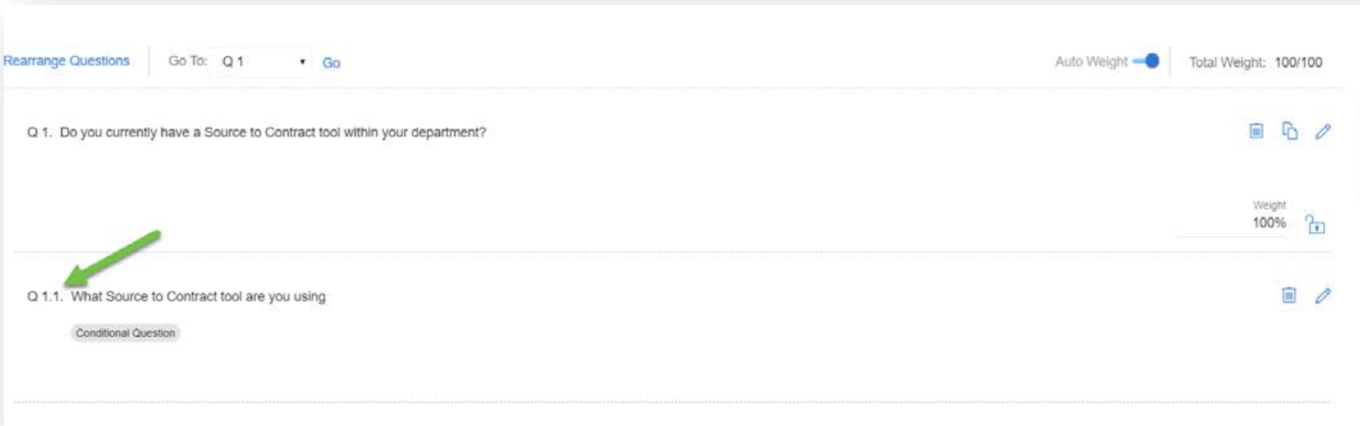
Contracts

- Ability to View the Notification Body for All Team Members
- Ability to Maximize and Minimize Additional Information Section
- Supplier Info on Contracts
- Ease of Access in Viewing Contract Change History

Sourcing Enhancements

Conditional Questions Sub-Numbered According to Parent Question

In the RFx **Questionnaire** section, conditional questions are now sub-numbered according to the parent question. For example, if the parent question is 1 then conditional sub-questions will be numbered as 1.1, 1.2, etc. This feature allows for easy differentiation between questions and sub-questions.



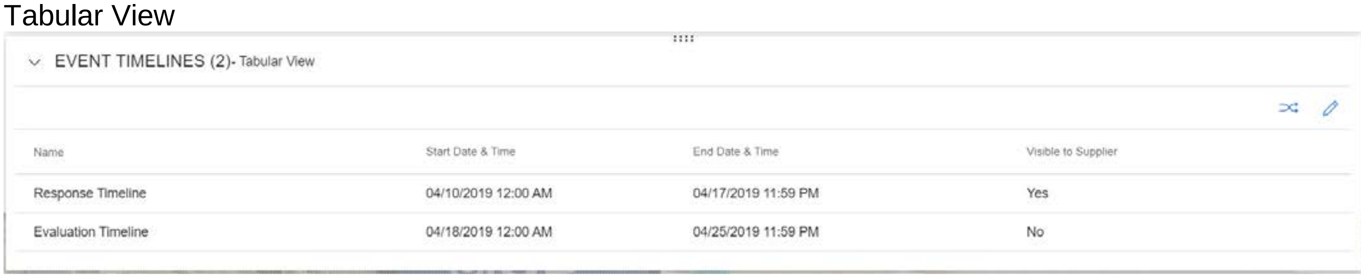
RFx – Timeline Section Enhancement

GEP has done multiple changes to the event timeline section within CalUsource Sourcing. Below are some of the key changes that are available to users.

Alternative Views
Both buyer and supplier users can now view the **Timeline** information in either a Gantt Chart view (current behavior) or Tabular view.

Gantt Chart

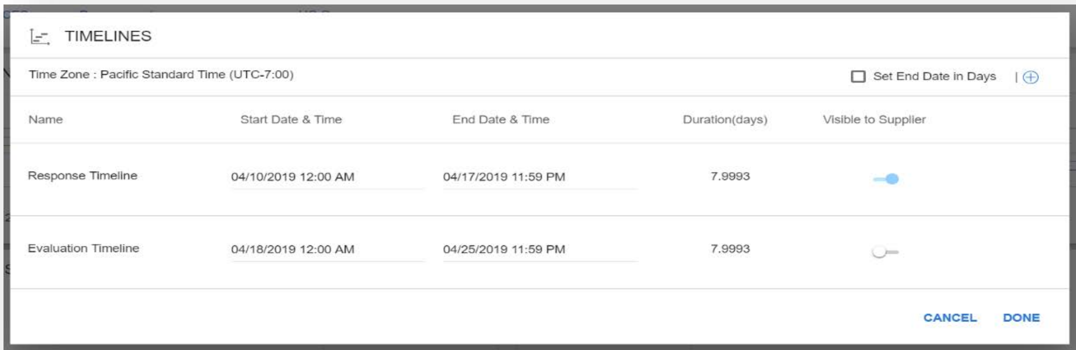
Tabular View



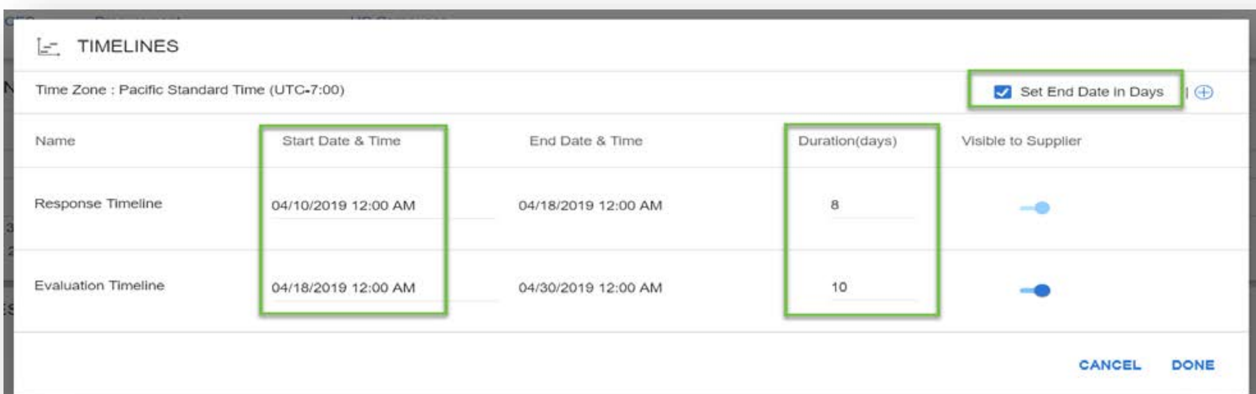
To modify your view, click on the icon in the top right-hand corner and it will automatically change the view.

Single View Timeline Modifications

Moving forward, Event Authors will no longer have to toggle between tabs to modify their timelines. They are listed in one location.



If the Event Authors does **not** have a preference for when the event opens or closes, they now can modify the timeline by entering the number of days.



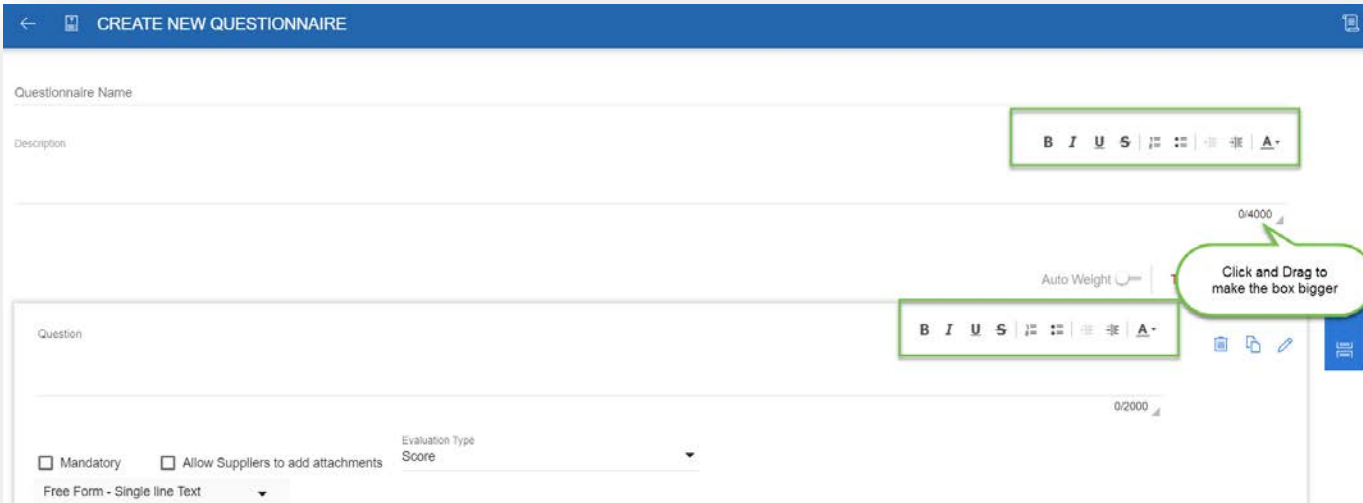
To do this, click on the pencil to edit your timeline, select ‘set end date” in days, modify start date and enter a number of days in “duration”.

When Event Authors are editing the timeline, they no longer have to worry about the order in which they modify their timelines to avoid the error box. The system will allow users to modify events in any order. When the Response Workbench and Evaluation timeline are overlapping a red bar will appear red under the overlapping timeline. This enhancement will provide an opportunity to make all the modifications without being kicked out of the edit box.

Please note:
If the evaluation setting is switched off for both **Price Sheet** and **Questionnaire**, then the **Evaluation Timeline** will not be available in the **Timeline** section.

Edit Question Information Using Rich Text Editor

Event Authors can now edit the **Price Sheet** and **Questionnaire** Descriptions, and **Questionnaire** Questions using the rich text editor. Allowing Event Authors to highlight a certain text, add indentation, make context bold, or italics, and so on.



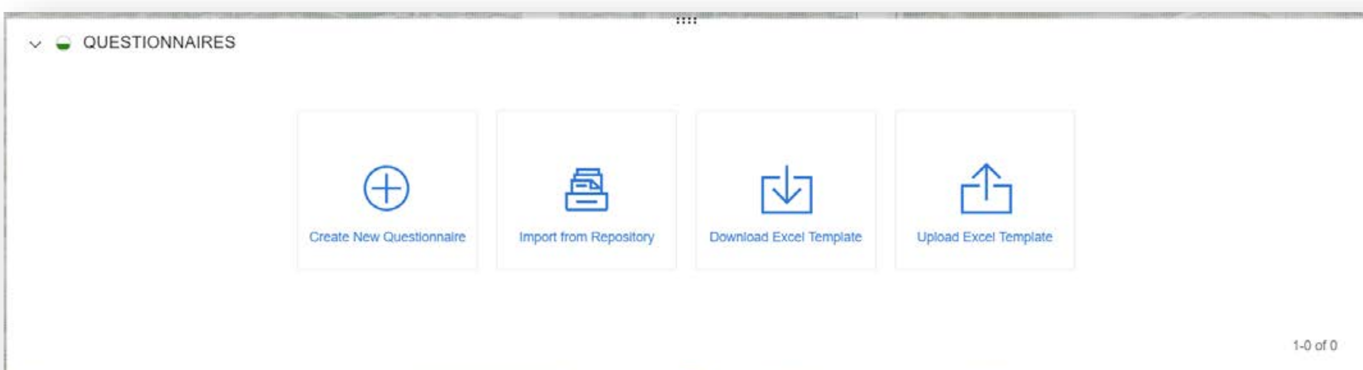
Please Note: This enhancement is providing basic formatting capability. Following advanced formatting capabilities will not be supported:

- Adding tables
- Adding images
- Justification

Additionally, if Event Author exports the details, formatting will not be maintained in the exported file. Also, when uploading, there will not be any formatting available on the application.

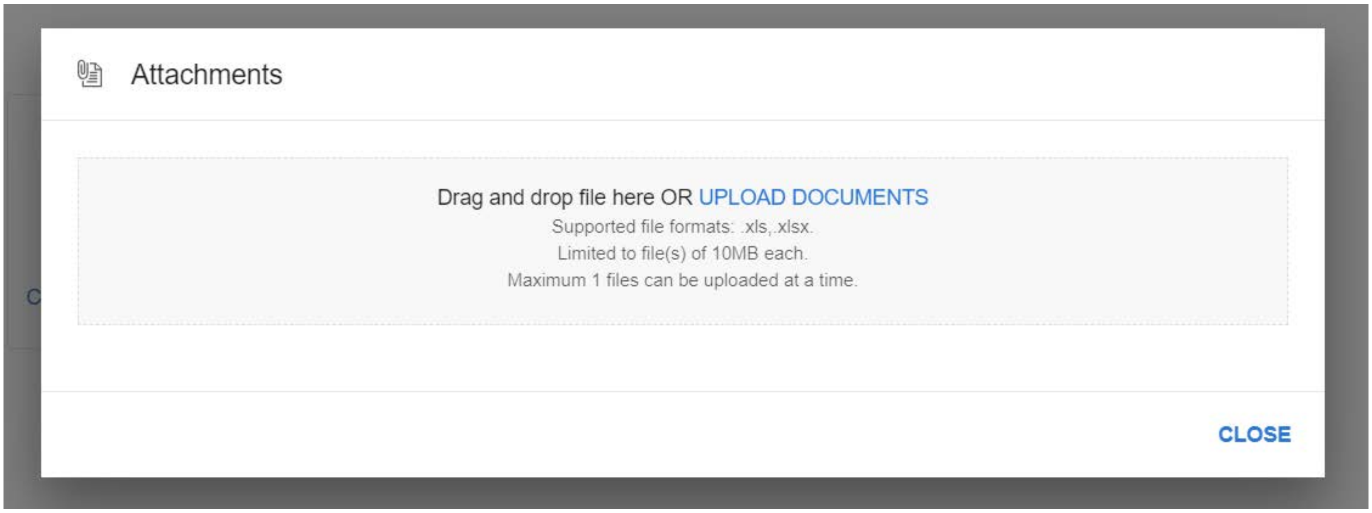
Ability to Upload Multiple Questionnaires via Template

An Event Author can now upload multiple questionnaires on the application using the standard Excel template.



To create a new questionnaire, the Event Author can click on "**Download Excel Template**," fill in the information offline and upload their template once done.

If you have clicked “**Download Excel Template**” you can upload the document after you are finished editing offline. To upload, click on “**Upload Excel Template**” and a new window will pop up.



The Event Author can upload one (1) Template at a time through this portal. Once the system has uploaded your template, it will be available for additional edits in the system

Please Note: Currently, CalUsource does not support upload for complex questions such as matrix-type questions. The only standard answers types can be created and uploaded. The above behavior is only available in draft status. If the event is withdrawn, then the user cannot upload questionnaire.

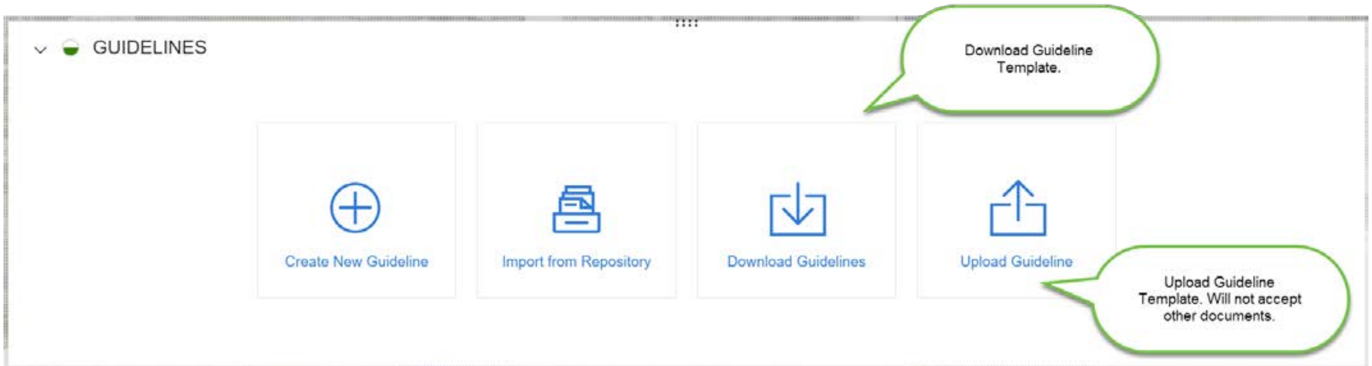
Supplier Preview

Event Authors/Co-Authors now have the ability to preview the RFx from the suppliers Point of View.

After you have added your suppliers to your RFx, a Preview button will appear on the right-hand side. Click on that, and you will be able to see the RFx from the supplier's point of view. You will be able to see if for each supplier.

Ability to Upload Multiple Guidelines in One Instance

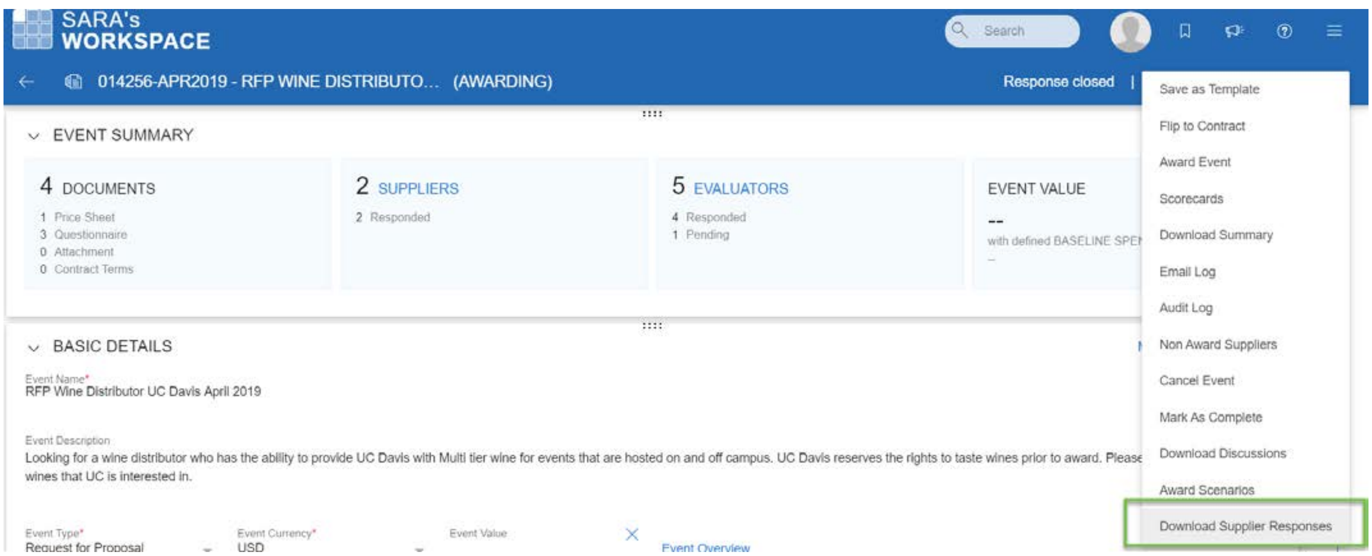
Event Authors/Co-Authors can now develop templates offline and upload them into GEP. First, the user will need to click “Download Guidelines” to acquire the Guideline template. Then fill in the necessary information within the document. Once complete, upload template by clicking Upload Guideline.



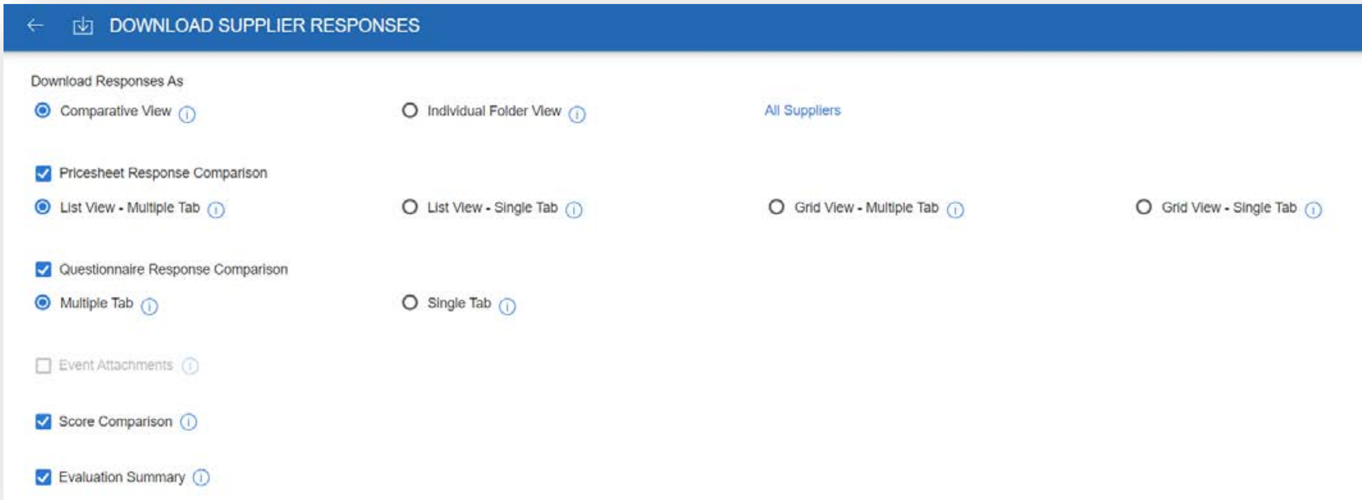
The upload feature will only work with templates provided by CalUsource. All other files will be rejected.

Downloading Supplier Responses

Event Authors/Co-Authors now have the ability to download all Supplier responses in one location. In the Event, click on the Actions menu, then select Download Supplier Responses.



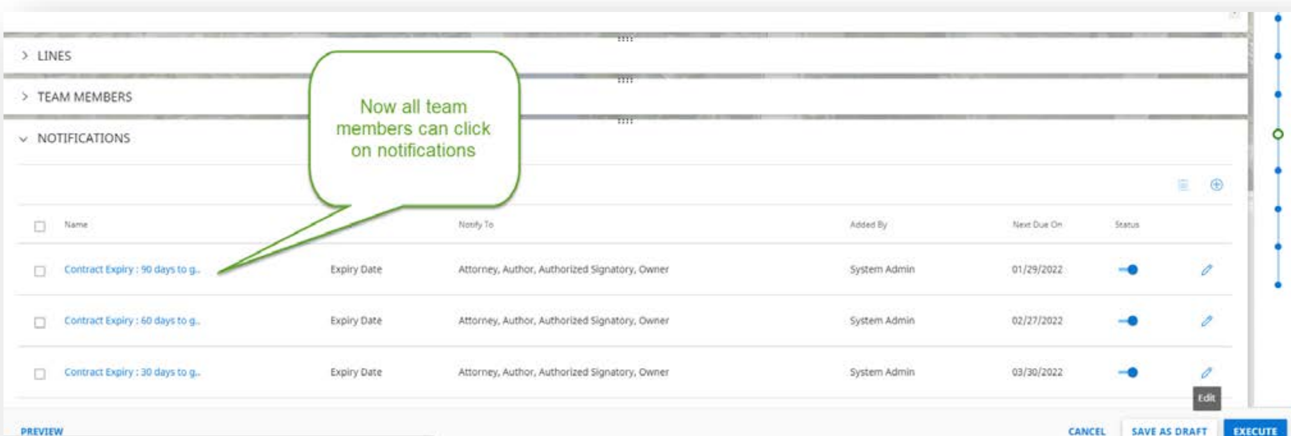
A new window will pop up and present options for the download. Users will be able to determine the view, suppliers, and documents they would like to see.



Contract Enhancements

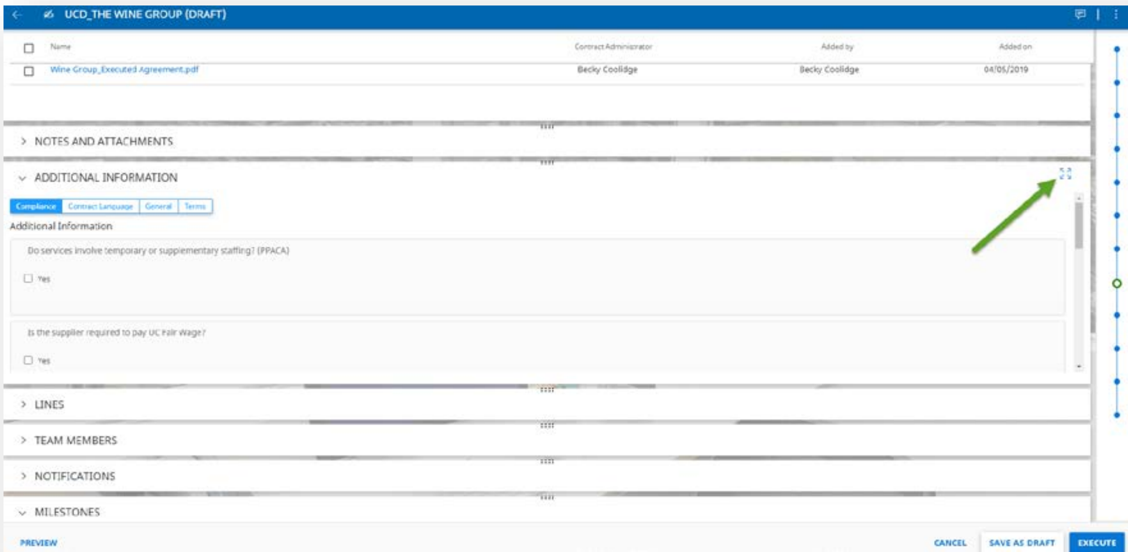
Ability to View the Notification Body for All Team Members

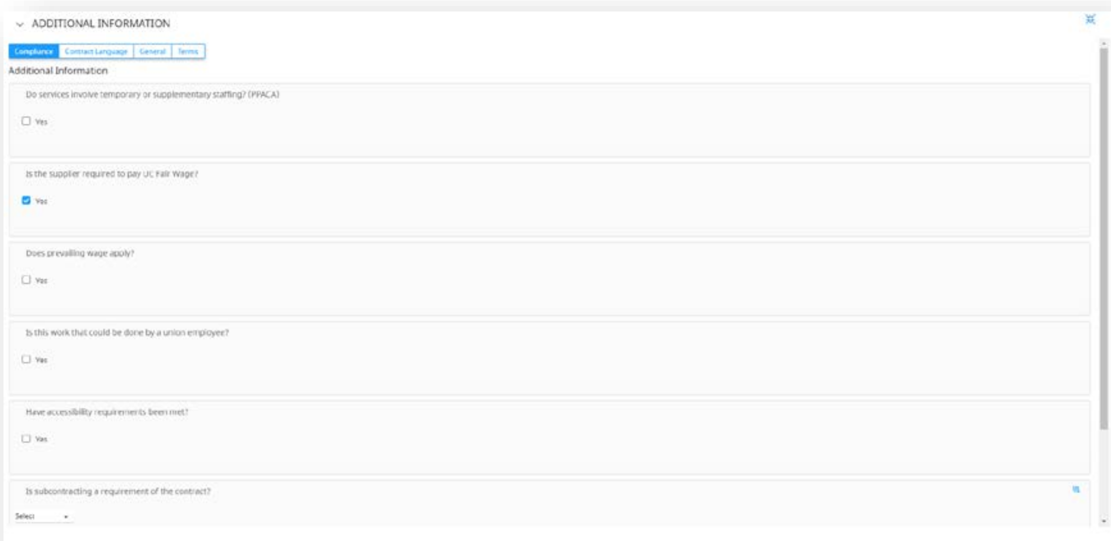
Previously team members could only see the list of notifications associated with a contract. With this update, any team member assigned to a contract can view the content of the contract notification by clicking on the notification. This is especially helpful if the administrator or other team members have created custom notifications. In addition to the body of the notification, it also gives you the ability to see the full recipient list (to and cc).



Ability to Maximize and Minimize Additional Information Section

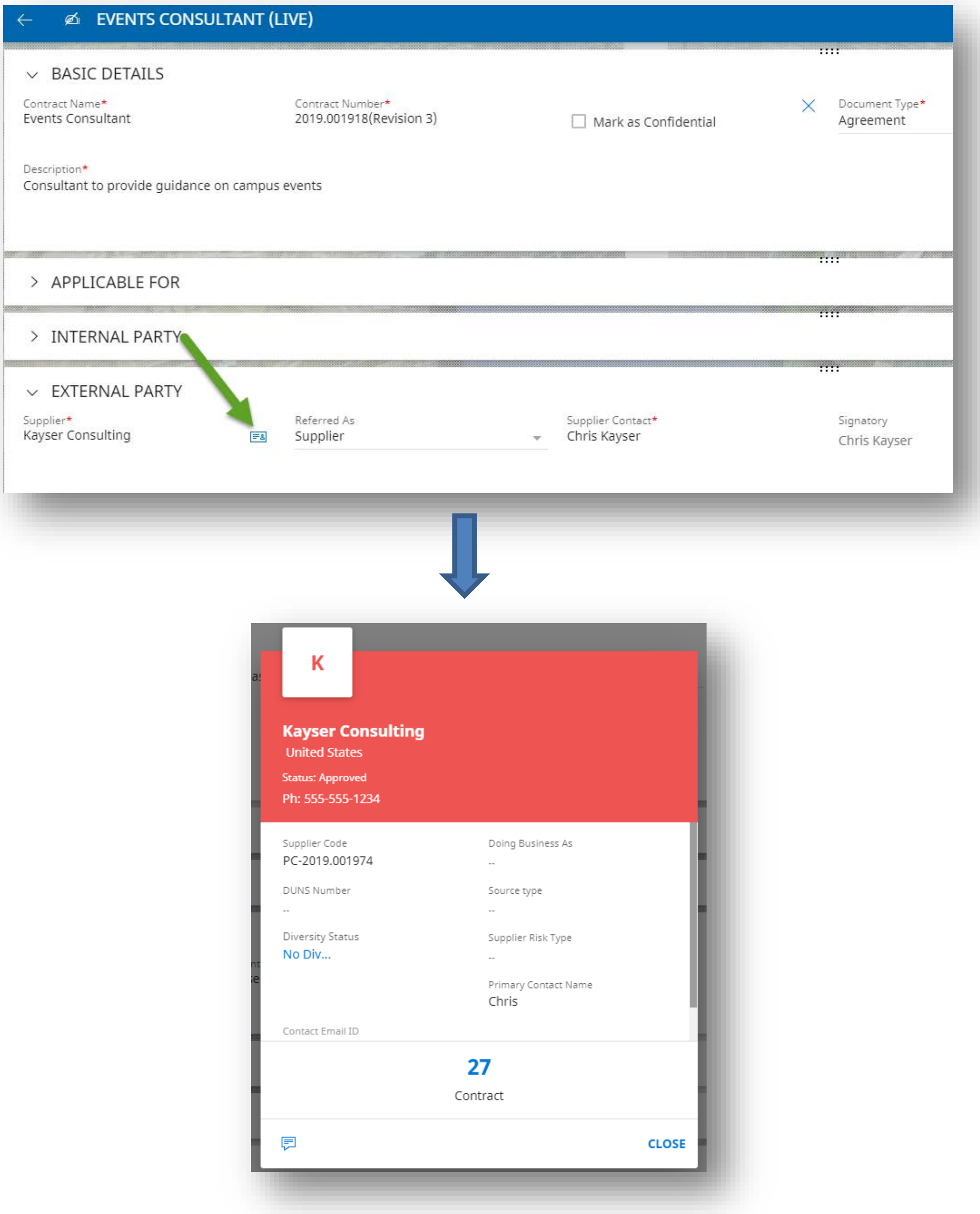
Previously, the additional information section was challenging to use because there were many questions crammed into a small box with a scroll bar. With this latest enhancement, the additional information section can now be expanded to a full-page view. This will allow you to easily complete the necessary questions in an easy-to-view manner.





Supplier Info on Contracts

It is now easier to view the basic details of a supplier from a contract. Simply click on the blue icon next to the supplier’s name and you can see high-level information regarding the supplier – this mirrors how sourcing is. Prior to this informational icon, if you wanted to view the details of a supplier, you had to exit a contract and search for the supplier within the supplier module.

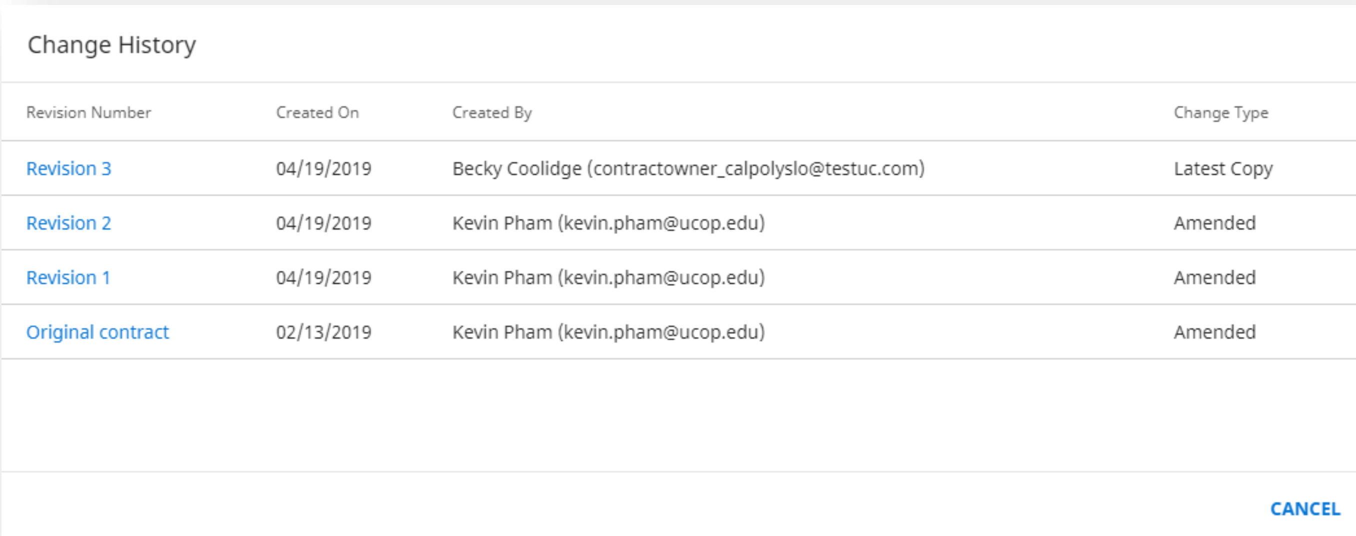


Ease of Access in Viewing Contract Change History

Updates have been made to the “Change History” on a contract wherein you can see a few new items:

1) How many versions of the contract exist
2) Who and when the contract was created
3) Which version of the agreement is the latest copy

Similar to before, this is available on a contract by going to the Actions menu in the upper-right hand corner.



Change History

Revision Number	Created On	Created By	Change Type
Revision 3	04/19/2019	Becky Coolidge (contractowner_calpolyslo@testuc.com)	Latest Copy
Revision 2	04/19/2019	Kevin Pham (kevin.pham@ucop.edu)	Amended
Revision 1	04/19/2019	Kevin Pham (kevin.pham@ucop.edu)	Amended
Original contract	02/13/2019	Kevin Pham (kevin.pham@ucop.edu)	Amended

CANCEL