



Sourcing & Contracts Enhancements

September 2018

Table of Contents

- CalUsource Sourcing & Contracts Enhancements..... 3**
 - Enhancement Guide Overview 3
 - September 2018 Enhancements..... 3
- Contracts Enhancements..... 4**
 - Amendments: Previous Documents Copy Over 4
 - Amendments: Mark Previous Documents as 'Inactive' 5
 - Amendments: Toggle Status of a Contract Document 6

CalUsource Sourcing & Contracts Enhancements

Enhancement Guide Overview

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

September 2018 Enhancements

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

Contracts

- Amendments: Previous Documents Copy Over
- Amendments: Mark Previous Documents as 'Inactive'
- Amendments: Toggle Status of a Contract Document

Contracts Enhancements

Amendments: Previous Documents Copy Over

Prior copies of the contract will copy over to the amended version of the agreement.

KATHY'S
WORKSPACE

RFP CORNING DISTRIBUTION RIGHTS UC (LIVE)

BASIC DETAILS

Contract Name
RFP Corning Distribution Rights UC ...

Contract Number
2018.001613

☐ Mark as Confidential

Document Type
Agreement

Terminate

Export

Track Status

Withdraw

Copy Contract

Amend

Audit Trail

Create Modification

Description
Distribution rights for approved Corning products

> APPLICABLE FOR

> INTERNAL PARTY

> EXTERNAL PARTY

> CONTRACT LANGUAGE - Authoring

> NOTES AND ATTACHMENTS

> LINES

PREVIEW

CANCEL

COPY CONTRACT

TERMINATE

RFP CORNING DISTRIBUTION RIGHTS UC (DRAFT AMENDMENT)

< BACK TO ACTIVE COPY OF CONTRACT

> EXTERNAL PARTY

CONTRACT LANGUAGE - Authoring

Language documents with type as 'Amended' Copies are for reference only and all actions can be taken on documents with type as 'Draft' Copies.

<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type	Modified On	Version	Status
<input type="checkbox"/>	Original_Contract-Purchasing, Independen..		Kathy Mills	Kathy Mills	Prior Copy	09/25/2018	1	<div></div>

> NOTES AND ATTACHMENTS

> LINES

> TEAM MEMBERS

> NOTIFICATIONS

PREVIEW

CANCEL

SAVE AS DRAFT

SEND FOR TEAM REVIEW

Amendments: Mark Previous Documents as 'Inactive'

You can mark the contract documents from the previous version of the executed agreement as inactive. Inactive contract language documents are not part of the signed copy.


RFP CORNING DISTRIBUTION RIGHTS UC (DRAFT AMENDMENT)

< BACK TO ACTIVE COPY OF CONTRACT

> EXTERNAL PARTY

> CONTRACT LANGUAGE - Authoring

① Language documents with type as 'Amended' Copies are for reference only and all actions can be taken on documents with type as 'Draft' Copies.

<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type ▾	Modified On	Version	Status
<input type="checkbox"/>	Original_Contract-Purchasing, Independen..		Kathy Mills	Kathy Mills	Prior Copy	09/25/2018	1	

> NOTES AND ATTACHMENTS

> LINES

> TEAM MEMBERS

> NOTIFICATIONS

PREVIEW

CANCEL

SAVE AS DRAFT

SEND FOR TEAM REVIEW


RFP CORNING DISTRIBUTION RIGHTS UC (DRAFT AMENDMENT)

< BACK TO ACTIVE COPY OF CONTRACT

> EXTERNAL PARTY

> CONTRACT LANGUAGE - Authoring

① Language documents with type as 'Amended' Copies are for reference only and all actions can be taken on documents with type as 'Draft' Copies.

<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type ▾	Modified On	Version	Status
<input type="checkbox"/>	Original_Contract-Purchasing, Independen..		Kathy Mills	Kathy Mills	Inactive	09/25/2018	1	

> NOTES AND ATTACHMENTS

> LINES

> TEAM MEMBERS

> NOTIFICATIONS

PREVIEW

CANCEL

SAVE AS DRAFT

SEND FOR TEAM REVIEW

Amendments: Toggle Status of a Contract Document

You can toggle the various filters for the types of contract language documents. Below is a quick summary of the different contract language types.

- **Prior Copy:** Previous copy of the executed agreement carried over to the amended contract.
- **Checked Out:** Document is currently being edited (if done editing, please check it back in).
- **Revised:** Previous copies of the executed agreement that have been modified/revised.
- **Newly Added:** New contract language documents added in this amendment.
- **Inactive:** Previous contract language documents that are not part of the amended, signed copy.

← RFP CORNING DISTRIBUTION RIGHTS UC (DRAFT AMENDMENT) < BACK TO ACTIVE COPY OF CONTRACT

> EXTERNAL PARTY

✓ CONTRACT LANGUAGE - Authoring

① Language documents with type as 'Amended' Copies are for reference only and all actions can be taken on documents with type as 'Draft' Copies.

<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type ▼	Modified On	Version	Status
<input type="checkbox"/>	Original_Contract-Purchasing, Independen..		Kathy Mills	Kathy Mills	Inactive	09/25/2018	1	

> NOTES AND ATTACHMENTS

> LINES

> TEAM MEMBERS

> NOTIFICATIONS

PREVIEW CANCEL SAVE AS DRAFT SEND FOR TEAM REVIEW

← RFP CORNING DISTRIBUTION RIGHTS UC HEALTH (DRAFT AMENDMENT) < BACK TO ACTIVE COPY OF CONTRACT

> EXTERNAL PARTY

✓ CONTRACT LANGUAGE - Authoring

① Language documents with type as 'Amended' Copies are for reference only and all actions can be taken on documents with type as 'Draft' Copies.

<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type	Modified On	Version	Status
<input type="checkbox"/>	Purchasing, Independent Contractor, Prof..		Kathy Mills	Kathy Mills	Newly Added	25/2018	1	
<input type="checkbox"/>	Original_Contract-Purchasing, Independen..		Kathy Mills	Kathy Mills	Inactive	25/2018	1	

> NOTES AND ATTACHMENTS

> LINES

> TEAM MEMBERS

> NOTIFICATIONS

PREVIEW CANCEL SAVE AS DRAFT SEND FOR TEAM REVIEW