



Sourcing & Contracts Enhancements

July 2019

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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.

July 2019 Enhancements

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

Sourcing

- Scoring Range changes to 0-4 to 1-5
- The ability for Evaluators to upload their scores

Contracts

- Contract “Author” and “Owner” renamed to “Administrator” and “Sponsor” on notifications
- Additional Contracts Fields in Reporting
- Supplier Creation Improvements

Sourcing Enhancements

Scoring Range changes to 1-5

Moving forward, the scoring range will be based off a 5 point scale to help reduce confusion and create consistency when scoring. As an Event Author, it will still be your responsibility to define what the matrix scores represent prior to your evaluation team starting the evaluation process. An example of a 5 point scale scoring matrix is as follows:

5	EXCELLENT: Response <u>exceeds</u> requirements and supplier has a superior grasp of process requirements and business rules.
4	GOOD: Response <u>substantially meets</u> requirements; supplier has a good grasp of requirements and business rules.
3	ADEQUATE: Response <u>meets</u> requirements; some gaps are evident or some items incomplete.
2	POOR: Response <u>incomplete or difficult to follow</u> ; significant gaps are evident.
1	UNACCEPTABLE: Response <u>does not meet</u> Campus's requirements.

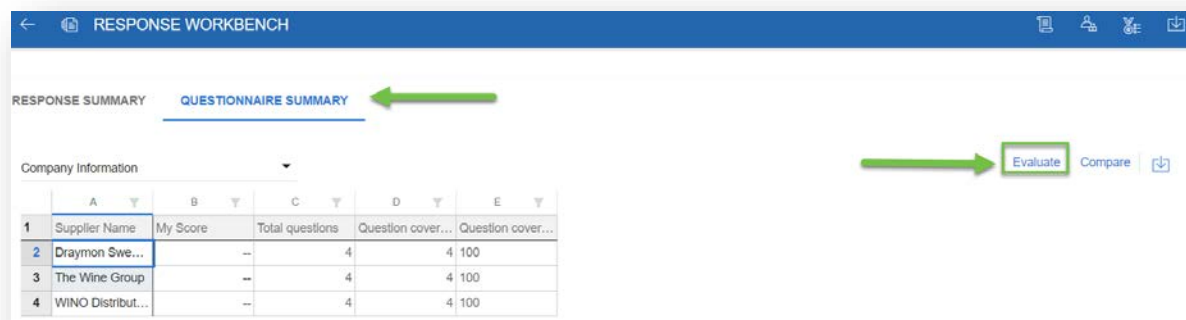
The ability for Evaluators to upload their scores



To help improve the evaluator's experience, Evaluators will now be able to download suppliers responses and add their scores to a CalUsource created excel template. This template will allow Evaluators to work off-line during the evaluation time frame.

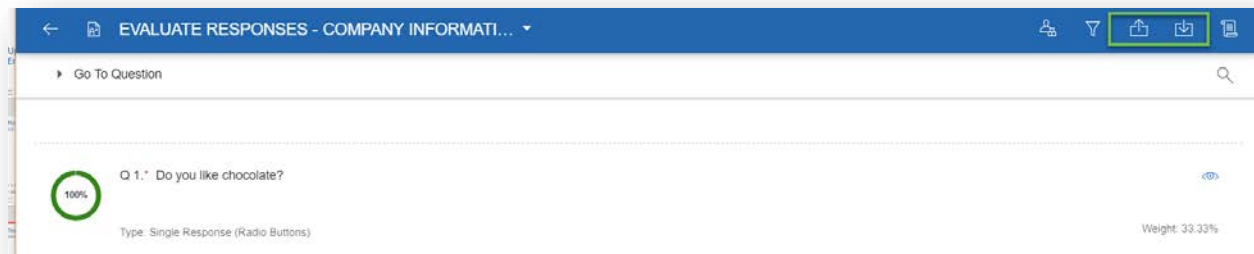
To access this feature, an evaluator would go into the response workbench.



Click on "Questionnaire Summary" and then click on "Evaluate."



From here the Evaluator will be able to see all the supplier submissions. They will have the option to continue evaluating in CalUsource, or they can click “download icon”  to download the supplier submissions and add their scores in the excel template. When the evaluator is done, the evaluator will click on the “upload icon”  to upload the completed excel template before starting the next questionnaire.



Repeat until all questionnaires have been scored and uploaded. Once you have finished and have ensured you have provided a score for all suppliers and questions, click the “Submit” button.






Contract Enhancements

Contract “Author” and “Owner” renamed to “Administrator” and “Sponsor” on Notifications

In an effort to improve consistency across CalUSource, the notifications now reflect the appropriate name of the individuals on a contract. Before, you could assign an “author” and an “owner” to a notification; however, there was no “author” nor “owner” on the contract document itself. Now, these have been appropriately renamed to “administrator” and “sponsor” to reflect the actual names of individuals on the contract.






Before

▼ NOTIFICATIONS

								
<input type="checkbox"/>	Name	Event	Notify To		Added By	Next Due On	Status	
<input type="checkbox"/>	Contract Expiry : 90 days to g..	Expiry Date	Attorney, Author, Authorized Signatory, Owner		System Admin	09/29/2020		
<input type="checkbox"/>	Contract Expiry : 60 days to g..	Expiry Date	Attorney, Author, Authorized Signatory, Owner		System Admin	10/30/2020		
<input type="checkbox"/>	Contract Expiry : 30 days to g..	Expiry Date	Attorney, Author, Authorized Signatory, Owner		System Admin	11/30/2020		

After

▼ NOTIFICATIONS

								
<input type="checkbox"/>	Name	Event	Notify To		Added By	Next Due On	Status	
<input type="checkbox"/>	Contract Expiry : 90 days to g..	Expiry Date	Attorney, Administrator, Authorized Signatory, Sponsor		System Admin	09/29/2020		
<input type="checkbox"/>	Contract Expiry : 60 days to g..	Expiry Date	Attorney, Administrator, Authorized Signatory, Sponsor		System Admin	10/30/2020		
<input type="checkbox"/>	Contract Expiry : 30 days to g..	Expiry Date	Attorney, Administrator, Authorized Signatory, Sponsor		System Admin	11/30/2020		

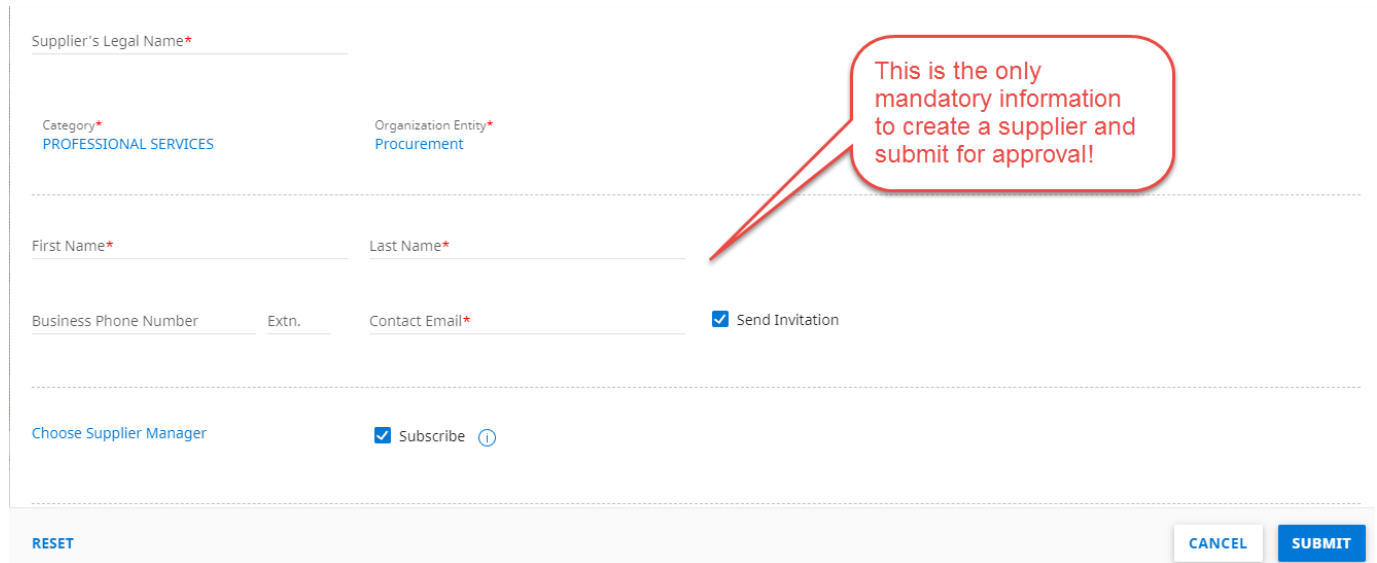
Additional Contracts Fields in Reporting

There are a number of new fields available in contracts reporting, listed below. These can be accessed by clicking on “Analyze”, then going to the “Reports” and “Contracts” section.

- Buyer Signature Date
- Supplier Signature Date
- RFx Number
- RFx Name
- Amendment Type
- Change Amount
- Last Modified Date
- Last Modified By
- Current Contract Status

Supplier Creation Improvements

Previously, CalUsource required you to fill out a lot of extra information after creating your initial supplier profile. This was especially cumbersome for contracts because the supplier is often not self registering. Now, all mandatory information to create a supplier can be found when performing the initial creation (“Create” > “Supplier Profile”).



Supplier's Legal Name*

Category*
PROFESSIONAL SERVICES

Organization Entity*
Procurement

First Name* Last Name*

Business Phone Number Extn. Contact Email*

☒ Send Invitation

Choose Supplier Manager ☒ Subscribe ⓘ

RESET CANCEL SUBMIT

This is the only mandatory information to create a supplier and submit for approval!