

# CALUSOURCE

— Collaborative Procurement

## Sourcing & Contracts Enhancements

December 2018

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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 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 functionality to existing CalUsource users.

## December 2018 Enhancements

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

### Sourcing

- Support for Questionnaire: Evaluator Scores with Comments

### Contracts

- Contract Last Signature Date as the Contract Effective Date

# Sourcing Enhancements

## Support for Questionnaire: Evaluator Scores with Comments

As an evaluator, you now have the ability to add comments to your evaluation scores. This is to allow evaluators the ability to explaining their score if they want too.

Below is the home screen for the response workbench for evaluators. Click on Evaluate

① Scoring range is from 0 to 4, where 0 is the lowest score and 4 is the highest score.

Map columns to view standard column values

PRICE SHEET SUMMARY **QUESTIONNAIRE SUMMARY**

Quality and Operations ▾ Evaluate Compare

	A	B	C	D	E
1	Supplier Name	My Score	Total questions	Question cove...	Question cove...
2	Draymon Swe...	--	4	4	100
3	Splash Brothe...	--	4	4	100
4	Swaggy P's S...	--	4	4	100

This is the number of questions in the questionnaire

This is the number of questions the supplier filled out and their % of completion

CANCEL **SUBMIT SCORES**

Select the question you wish to score. To do this click on the question text

← EVALUATE RESPONSES - QUALITY AND OPERATIONS

Go To Question

Q1. Please describe your manufacturing processes

Type: Multiple Line Text Weight: 25.00%

Q2. Do you currently do business with UC/CSU/CCC

Type: Single Response (Radio Buttons) Weight: 25.00%

If you are being asked to only score certain supplier, please make sure to select them by clicking on the supplier icon.

The answers to the question will drop below. You can read through the answer and add you score to the right hand side. If you wish to add comments, select the text bubble next to the area you would place your scores

The screenshot shows a question titled "Q1. Please describe your manufacturing processes" with a weight of 25.00%. It has three responses. The first response, from "Draymon Sweep Sweepers", is "hand screen printing. Can do roughly 8 shirts at a time" and has a score of 4 out of 4. The second response, from "Splash Brothers Memorabilia", is "screen printing." and has a score of 4 out of 4. The third response, from "Swaggy P's Shirts", is "contract with manufacture to help reduce pricing." and has a score of 4 out of 4. At the bottom, a green progress bar indicates "50% EVALUATION COMPLETE". Buttons for "CANCEL", "SAVE", and "DONE" are visible.

After you select the text bubble, a text box will pop up and allow you to add your explanation

This screenshot shows the same question and responses as the previous image. A text box for adding an explanation is now open over the first response, showing a character count of "0/2000".

# Contracts Enhancements

## Contract Last Signature Date as the Contract Effective Date

Previously, the contract author was required to input a specific date for the Effective Date. This could cause issues during authoring as signature can often be the impetus to be a contract becoming effective. This enhancement allows the contract author to define last signature date as the contract effective date, if so desired. A manual date can still be inputted. See screenshots below for more information.

TERMS

Parent Contract Number: \_\_\_\_\_ Parent Contract Name: \_\_\_\_\_

Currency: USD Contract Value: 0.00 Payment Term: NET 30

Effective Date: --

Remain in effect for period of: -- Effective Period: \_\_\_\_\_

Day(s): --

Renewal: on need basis

**Effective Date**  
Last Signature Date

CANCEL SAVE AS DRAFT

TERMS

Parent Contract Number: \_\_\_\_\_ Parent Contract Name: \_\_\_\_\_

Currency: USD Contract Value: 0.00 Payment Term: NET 30

Commencing On Last Signature Date

Effective Date: --

Remain in effect for period of: -- Effective Period: \_\_\_\_\_

Day(s): --

Renewal: on need basis

Effective date would be the last Signature date of the contract.

CANCEL SAVE AS DRAFT

TERMS

Parent Contract Number: \_\_\_\_\_ Parent Contract Name: \_\_\_\_\_

Currency: USD Contract Value: 100,000.00 Payment Term: NET 30

Commencing On Last Signature Date

Effective Date: 12/05/2018

Remain in effect To Date: --

Expiry Date: 12/04/2019

Renewal: on need basis

> CONTRACT LANGUAGE - Authoring

PREVIEW CANCEL COPY CONTRACT TERMINATE