

CALUSOURCE

— Collaborative Procurement

Sourcing & Contracts Enhancements

January 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 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.

January 2019 Enhancements

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

Sourcing

- Mark a Question as Acceptable/Unacceptable
- Response Workbench – Scores based on Finalized Score Card
- Response Workbench – Audit Log Enhancement

Sourcing Enhancements

Mark a Question as Acceptable/Unacceptable

Apart from providing score, a buyer can now mark a question as **Acceptable** or **Unacceptable** in the evaluation type. A drop-down is made available against each question with the value as **Score**, **Informative**, and **Acceptable/Unacceptable**. Thus, while evaluating instead of providing score, the buyer can provide the evaluation for the question as **Acceptable** or **Unacceptable** with comments.

The image displays two screenshots of a question configuration interface. The top screenshot shows a question with the text "Please present an introduction and general description of your company's background; identify and substantiate with examples why you are well-qualified to provide requested services." The question is set to "Free Form - Multi line Text" and "Conditional Question" is unchecked. The "Evaluation Type" dropdown menu is open, showing "Score" as the selected option. The bottom screenshot shows the same question, but the "Evaluation Type" dropdown menu is open, showing three options: "Score", "Informative", and "Acceptable or Unacceptable".

Drop Down Descriptions

Score: an evaluator will score this question between 0-4

Informative: no score or weight will be associated with this questions. This is purely an FYI

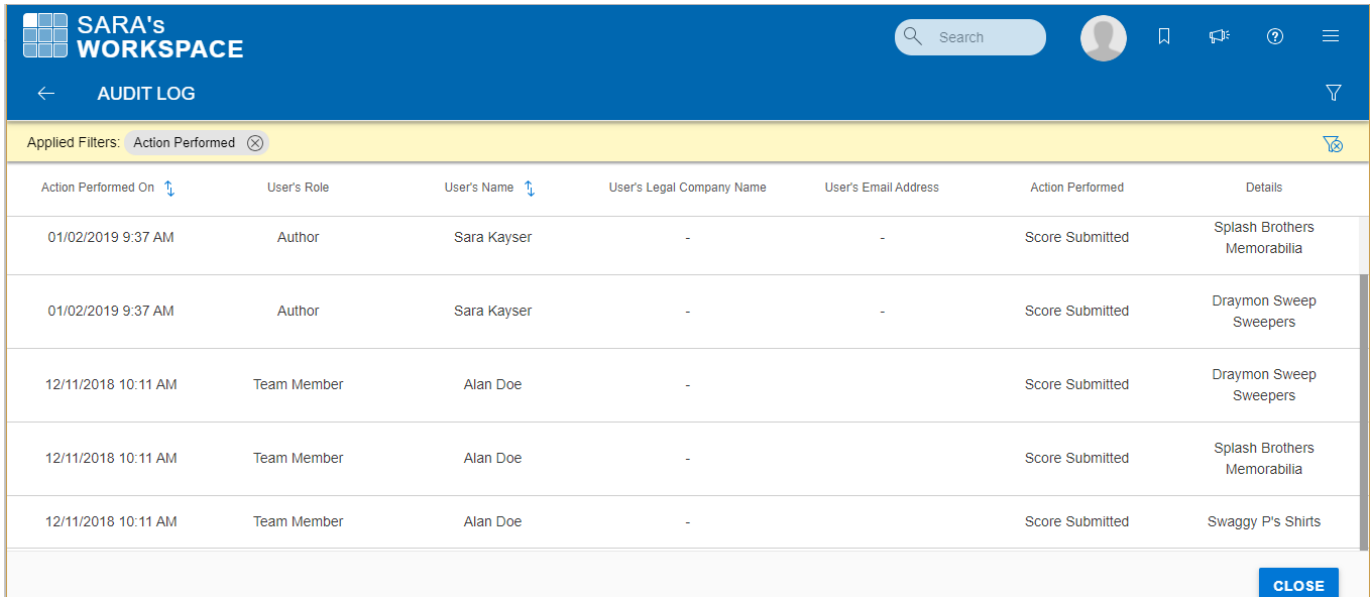
Acceptable or Unacceptable: an evaluator is only given 2 options when reviewing. The answer is either acceptable or not. No weight will be associated to this question.

Response Workbench – Scores based on Finalized Score Card

Response Workbench now displays scores and weight based on the Finalized Score Card. In case the score card is not finalized, the scores will be based on the default score card.

Response Workbench – Audit Log Enhancement

The audit log will now capture the details of user viewing response workbench. If any user clicks Response Workbench to view Supplier responses, an entry will be made in the response workbench audit log indicating the type of action performed



The screenshot shows the 'AUDIT LOG' page in SARA's WORKSPACE. The page has a blue header with the logo and a search bar. Below the header, there is a yellow bar indicating 'Applied Filters: Action Performed'. The main content is a table with the following columns: Action Performed On, User's Role, User's Name, User's Legal Company Name, User's Email Address, Action Performed, and Details. The table contains five rows of data, all showing 'Score Submitted' actions.

Action Performed On	User's Role	User's Name	User's Legal Company Name	User's Email Address	Action Performed	Details
01/02/2019 9:37 AM	Author	Sara Kayser	-	-	Score Submitted	Splash Brothers Memorabilia
01/02/2019 9:37 AM	Author	Sara Kayser	-	-	Score Submitted	Draymon Sweep Sweepers
12/11/2018 10:11 AM	Team Member	Alan Doe	-	-	Score Submitted	Draymon Sweep Sweepers
12/11/2018 10:11 AM	Team Member	Alan Doe	-	-	Score Submitted	Splash Brothers Memorabilia
12/11/2018 10:11 AM	Team Member	Alan Doe	-	-	Score Submitted	Swaggy P's Shirts

Action Performed Status

Response Summary: A user has accessed the response work bench to start reviewing supplier responses.

Score Submitted: The Users have gone in a submitted a score for a particular supplier