

# CALUSOURCE

— Collaborative Procurement

## Sourcing & Contracts Enhancements

September 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 CalUsource platform. This guide is not intended to be a comprehensive training guide, but rather is a way to communicate new functionality to existing CalUsource users.

## September 2019 Enhancements

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

### **Sourcing**

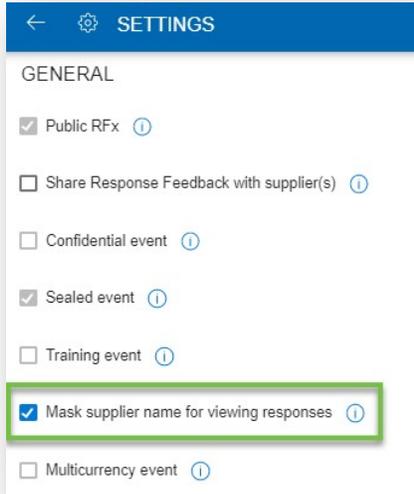
- Hiding Supplier Name during Evaluation

### **Contracts**

- New Notification Template: Certificate of Insurance

# Sourcing Enhancements

## Hiding Supplier Name during Evaluation



CalUsource now offers users the ability to hide their suppliers' names from the evaluation team. This enhancement is to further promote our current fair and ethical evaluation process by making submitted responses supplier agnostic. This feature is optional by project and can be turned on and off during the project Draft and Supplier Response phase.

To do this, go to the General Settings and click on “Mask supplier name from viewing responses.”

After the Event Author has published the event, they will see a new field in the Supplier section of your sourcing event called “Alias Name.” This will be visible only to the Event Author and Co-Author. An alias will only be assigned after the supplier submits their response to the RFx.

Name	Alias Name	Primary Respondent	Profile Status	Participation Status
Draymon Sweep Sw...	Bidder-111	Draymon Blue	Approved	Response Submitted on 09/16/2019 9:22 AM
Splash Brothers Me...	Bidder-198	Clay Tomp	Approved	Response Submitted on 09/16/2019 9:19 AM
The Wine Group	-	Liz Flemming	Approved	Invited on 09/16/2019 8:59 AM

	A	B	C	D	E
1	Supplier Name	My Score	Total questions	Question cove...	Question cove...
2	Bidder-111	--	4	4	100
3	Bidder-198	--	4	4	100
4	Bidder-704	--	4	4	100
5	Bidder-933	--	4	4	100

During the Evaluation phase, the suppliers' name will be hidden from everyone, including the event Author and Co-Author; ensuring a fair evaluation from all stakeholders.

### ADDITION TIPS:

1. If the supplier self identifies within their response, CalUsource will not be able to remove that information.
2. The Suppliers name will also be masked in the Evaluation Export, Scorecard, and Audit and Email Log.

# Contract Enhancements

## New Notification Template: Certificate of Insurance

A new template for certificate of insurance (COI) expiry has been added to CalUsource contracts – two versions available (CSU and UC). This template can be applied any time throughout the contract’s lifecycle in order to proactively manage upcoming COI expirations. By default, the notification will go out to the supplier point of contact assigned on the agreement and yourself as the contract administrator.

To add the new template, simply click on the (+) icon within the “notifications” section. Then, set a custom date based on the COI’s expiration. This will schedule the notification email to be sent out at a date in the future.

The screenshot displays the 'Notifications' configuration page. At the top, there are three main sections: 'Name\*' with the value 'CSU Certificate of Insurance Expiry Rem...', 'Template Name' with a dropdown menu showing 'CSU Certificate of Insurance Expiry Rem...', and 'Status\*' with radio buttons for 'On' (selected) and 'Off'. Below this is an 'Alert\*' section highlighted in yellow, showing 'Before' as the trigger, '30 Day(s)' as the duration, 'Custom Date' as the type, and '12/31/2019' as the date. A 'Set Recurrence' checkbox is present and unchecked. The 'To' field is set to 'Supplier Point of Contact;' and the 'Cc' field is set to 'Administrator;'. The 'Subject' field contains 'CSU Certificate of Insurance Expiry Reminder'. On the left, there are expandable sections for 'Basic Variables' and 'Signatories'. The main area is a rich text editor with a toolbar containing bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, styles, format, font, and size options. The message content in the editor reads: 'Dear [Supplier Name]:  
Per the details of contract [Contract Number], [Supplier Name] must, at its own expense, obtain and keep in force proper insurance during the entire term of this contract to cover any work done for the University for the next period.  
This message serves as a reminder that the current certificate of insurance will expire within the next 30 days. An active certificate of insurance must be on file in order to continue services.'