


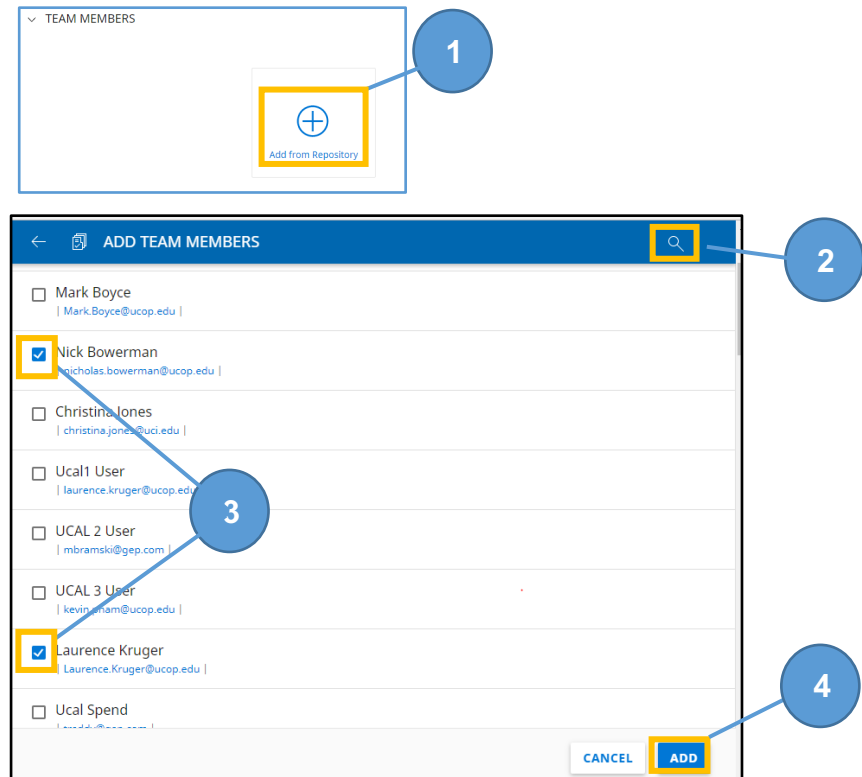
Adding New Team Members

The RFx Team Members section enables you to add staff to your event and then configure their role so that they can view or edit the event and evaluate supplier responses, as needed. Team members must be already be setup in the CalUsource Team Member repository in order to be selected.

Selecting Team Member to Add

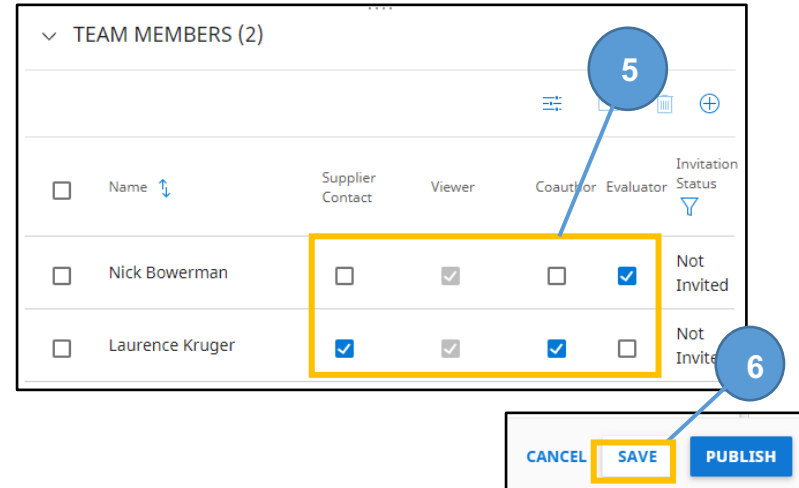
1. In the **Team Members** section of the RFx, click **Add from Repository**.
2. Click the **Search**  magnifying glass icon. Type the name of the team member you want to add and press Enter.
3. Check the box of the team member(s) you want to add to the event.
4. Click **Add** to add team member(s).

Note: The **Add** button does not appear until at least one team member has been checked.




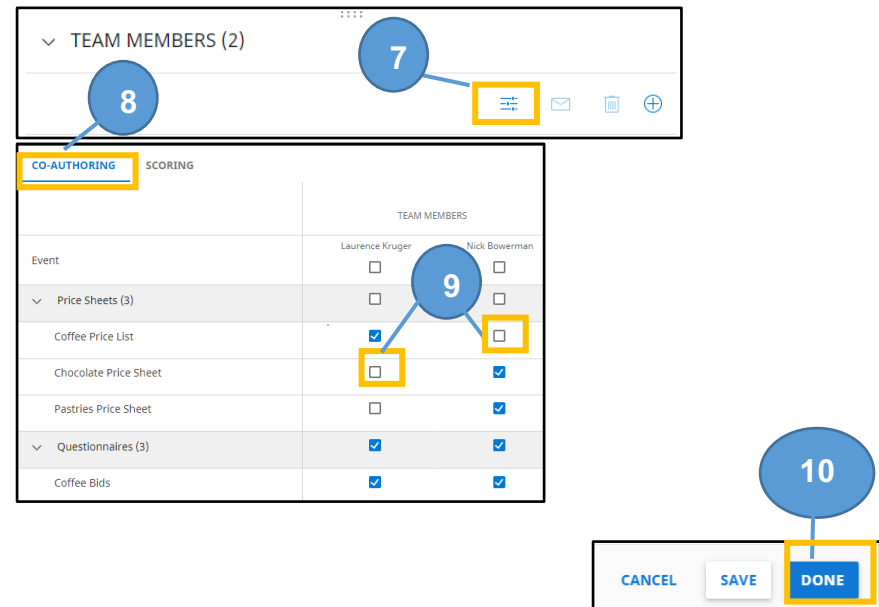
Assigning Roles

- In the **Team Members** section, check the boxes to assign roles to team members:
 - Supplier Contact**
 - Viewer** (not editable)
 - Coauthor**
 - Evaluator**
 (Details about these roles are in the Notes section below.)
- Click **Save** to save the role assignments.




Limiting Documents to Edit or Score

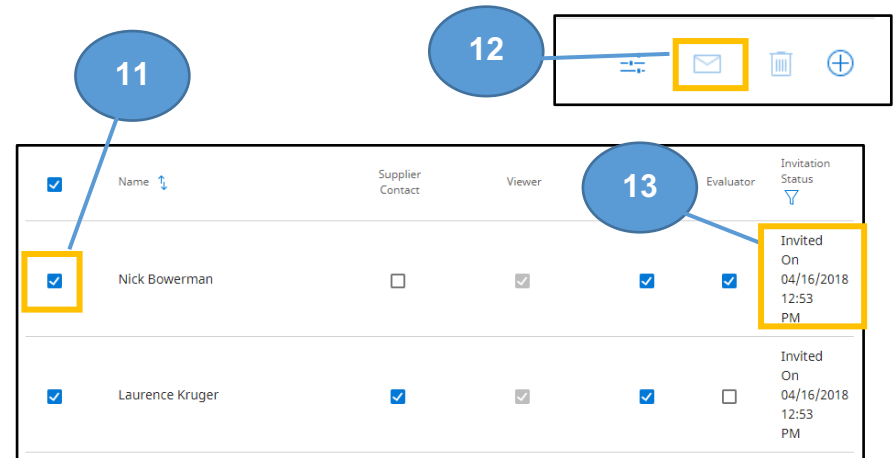
- To limit the documents a team member can edit or score, click the **View Configuration** icon.
 
- Click **Co-Authoring** or **Scoring** to select the documents that team members are allowed to edit or score.
- Click on the checkboxes to unselect a team member's ability to edit or score a specific document
- Click **Save** and **Done**.



Resending an invite

Team members are automatically sent an email invitation to join the event when it is published.

11. To resend the invite, check the box to the left of the team member(s) name.
12. Click the **Email** icon.  The invitations are immediately sent out.
13. The **Invitation Status** field displays the time that the team member's invitation was sent.



Note: If a team member is added after the event has already been published, they will not automatically be invited. Use the above steps to send them the initial invitation.

Tips

- If a team member is not in the repository, email the UC Procurement Zendesk at support@ucprocure.zendesk.com to get them added. Provide the member's first and last name, and email address. They will be setup with a Campus Viewer persona (role).
- Once setup in the Team Member repository, you can add them to your event.
- The total number of team members in your event is reflected in the Team Member section title.

Notes

- A team member can be assigned to more than one role in an event.
- Team Member roles:
 - **Supplier Contact:** Has the ability to talk with suppliers in the Discussion Forum
 - **Viewer:** Can view the RFx. This is checked by default for all team members and cannot be unchecked.
 - **Co-Author:** Has the the ability to make edits to the RFx
 - **Evaluator:** Has the ability to view and score supplier responses