Quick Reference Guide

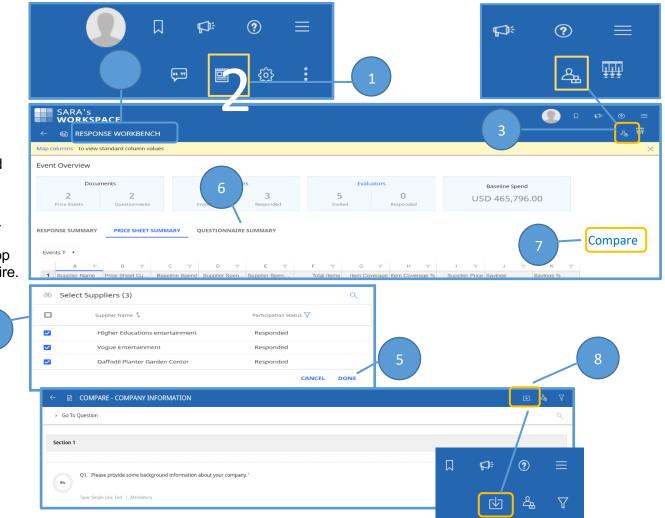
CALUSOURCE Collaborative Procurement

Exporting a Questionnaire

You may find it easier to review supplier responses to the questionnaire you are examining by exporting their responses from CalUsource into an Excel file. Page two of this guide provides some of the advantages of using Excel to review supplier questionnaire responses. **Important Note:** Once you have reviewed the exported questionnaire, you must go back into CalUsource and enter your scores.

Export an RFx Questionnaire

- 1. Click the **Response Workbench** icon on top of RFX home page.
- 2. Review the Summary Suppliers' Responses on the **Response Workbench** screen.
- 3. Click Select Suppliers icon.
- 4. Select all the Suppliers you would like to evaluate.
- 5. Click Done.
- 6. Select Questionnaire Summary.
- 7. Click Compare.
- 8. Click the **Download** Icon in the top right to download the Questionnaire.



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Advantages of Viewing Supplier Responses in the Exported Questionnaire file

- Excel shows suppliers response to each question side by side (in columns). This makes it easy to review and compare supplier responses with one another.
- Excel displays the entire supplier question response, as opposed to CalUsource, where you have to hover over the first line of the question to see a popup displaying the entire responses.
- You can print out the Excel file, and review it on paper and take notes