Quick Reference Guide

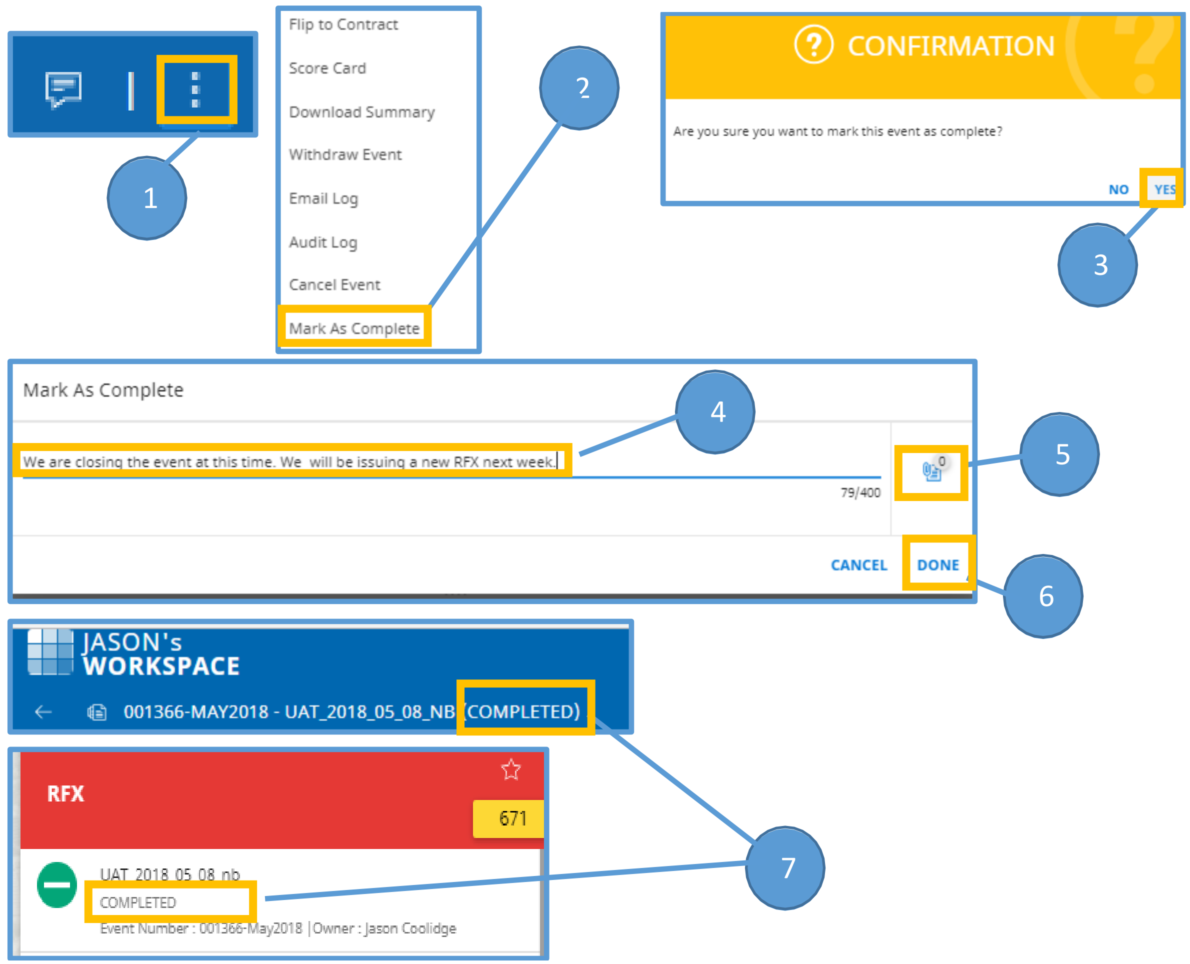
CALUSOURCE
Collaborative Procurement

Closing an Event

You can close an event any time after the event's response period has ended, including after it has been awarded to remove it from your task list. It is best practice to provide attachments when closing an event to document your award decisions.

Instructions for Closing an Event

1. Click the **Action Menu**.
2. Click **Mark as Complete.** (This is only available when the response timeline window is closed).
3. Click **Yes** in the **Confirmation** message**.**
4. Enter a comment in the **Mark as Complete** popup window explaining why you are closing the event (required.) Your comments will be included in the email notification sent to suppliers and team members.
5. Click the **Attachment** icon to attach documents that provide supporting information that impacted your award decisions (optional). Attachments are <u>not</u> included in the email notification. See Accessing Attachments Added When Closing an Event on the next page to see how to view attachments post-event close.
6. Click **Done**.
7. The status **Completed** displays in the event's top blue bar. Closed events can only be accessed from the **Manage** menu where they will be marked "**Completed**."



Closing Event Notes

- You cannot unclose a closed event.
- You can only make minor changes to closed events. Options are:
  - Change the event's name and description.
  - Add/remove team members and perform all team-related setup activities.
  - Reassign the supplier's Primary Respondent.
- You will not be able to flip a closed event to contract.
- Any attachment added in the **Mark as Complete** pop-up window is not included in the notification email sent to team members and suppliers, but is available for review in the event's **Audit Log**. See below for further details on how to access added attachments.

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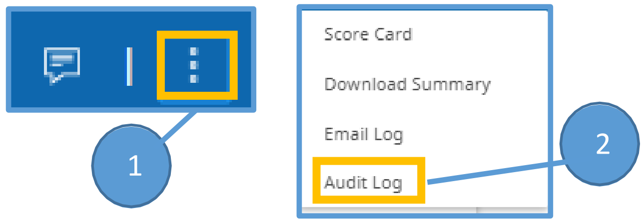
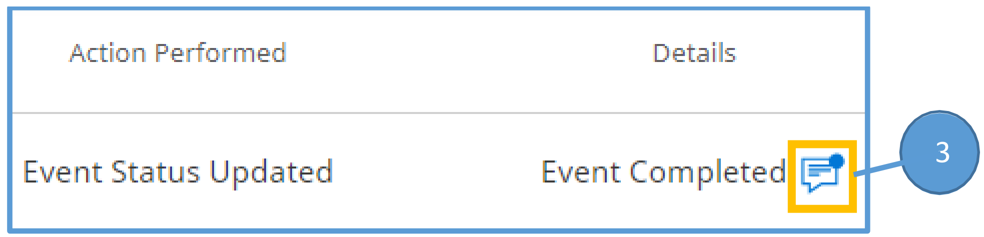
Instructions for Accessing Closed Event Attachments

1. Click the **Action Menu**.
2. Click **Audit Log.**



3. Find the audit log line showing **Event Completed**, click the **Comments** icon to show the comment and any attachments.



4. In the **Comments** pop-up window, attachments added when the event was closed are listed.

   Click on an attachment link to display its contents.