Quick Reference Guide

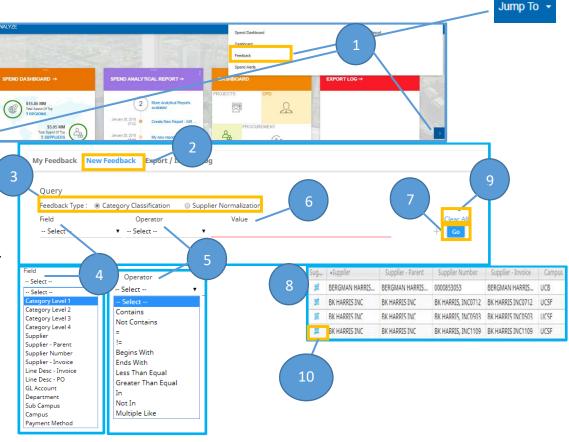**CALUSOURCE**
Collaborative Procurement

Leaving Category and Supplier Feedback

Optimizing CalUsource as a truly collaborative platform of categorized *procurement* data that we can use with confidence works best when you to provide us with feedback on supplier data that should be normalized or products and services that need to be reclassified.

Leaving Category and Supplier Feedback

1. Click **Analyze** in the **Main Menu**, and then use the **Jump To** menu and select **Feedback.** You can also click on the left and right arrows on either side of the screen to display the **Feedback** card.

2. Click **New Feedback**.
3. Select either **Category Classification** or **Supplier Normalization** in the **Feedback Type** field.
4. Select the field that the data you are giving feedback on reside in the **Field** drop down list.
5. Select the appropriate operator from the **Operator** drop down search to appropriately refine your search.
6. Type the search string to identify the category or supplier name or partial name in the **Value** field. **Note**: You do not need to include * when you have selected **Contains** as the Operator in Step 5.
7. Click **Go**
8. **Search Results** display information that will help you identify the precise record you are looking for.
9. If too many results display, click **Clear All** and start over with a more concise search term.
10. Click the **Suggest** icon next to the item for which you want to provide feedback.

11. On the **Provide Feedback** screen, type your feedback in the comments field. Your feedback can be a suggestion for the correct category name or the correct supplier name for the item you have selected. It can also be general comments about recategorization that the item you selected is indiciative of.
12. Click **Submit**. Your feedback will be sent for review.

Notes

- If your search criteria is too broad – resulting in a large number of search results, you may receive an error message asking you to narrow your search.
- The Provide Feedback screen will give you the opportunity to suggest changes to category name at each level or the supplier name and/or the supplier-parent name.

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Reviewing the Status of Your Feedback

1. Click My Feedback to see the status of items you submitted for category classification or supplier normalization.

2. The top row lists items in review. The review could be pending, approved, rejected or on hold.

3. The second row lists items that have been reviewed and are in the approval process. The approval could be pending, approved, rejected, on hold, in progress, completed, in error or withdrawn.

4. The rows list each feedback item you have submitted.

My Feedback   New Feedback   Export / Import Log

1	0	0	0
Review Pending	Review Approved	Review Rejected	Review On Hold

0	0	0	0	0	0	0	0	1
Approval Pending	Feedback Approved	Feedback Rejected	Feedback On Hold	In Progress	Completed	Error	Withdraw	Total

Show Highlighted

View	ID	Feedback Type	Status	Category L...	Category L...	Category L...	Category L...	Supplier	Supplier - P...	Supplier Nu...	Supplier - I...	Line Desc - ...	Line Desc - ...
👁	4	Category Classification	Review Pending	(UNCLASSIFI...	(UNCLASSIFI...	(UNCLASSIFI...	(UNCLASSIFI...	SMF PEETS C...	SMF PEETS C...	SMF PEETS C...	SMF PEETS C...		