

# CALUSOURCE

Collaborative Procurement

## Sourcing & Contracts Enhancements

October 2018

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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 changes and enhancements to the tool. This is not intended to be a comprehensive training guide, but rather serve as a tool to communicate new features to existing CalUsource users.

## October 2018 Enhancements

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

### Sourcing

- Downloading the Discussion Forum
- Ability to Rearrange the Guidelines and Questionnaires

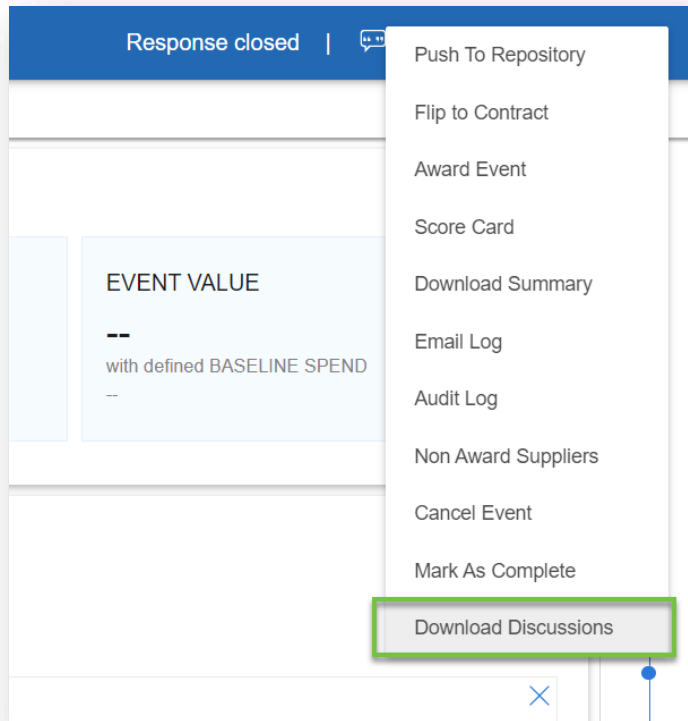
### Contracts

- Rearrange Contract Language

# Sourcing Enhancements

## Downloading the Discussion Forum

Buyers and supplier can now download discussions carried out in the discussion form of the RFx. Each Participant will be able to download discussions only from those topics wherein they are in a participant. Suppliers will not be able to download other supplier comments that took place in shared discussion forums. The download will export as an excel document for easy data manipulation



## Ability to Rearrange the Guidelines and Questionnaires

Previously, the guidelines and questionnaires were ordered based on the creation date. Moving forward we will be able to display them in a specified order to capture the immediate attention of the supplier.

The following changes have been implemented:

- Capability for author to see a new option/icon to rearrange the guidelines/questionnaire under Guidelines and Questionnaire sections respectively.
- In the rearrange screen, you can now drag and drop the guideline/questionnaire and define its order.
- Based on defined rearrangement order, supplier will see the details post event is published.

<input type="checkbox"/>	Guideline Name	Guideline Type	Acknowledgment from Supplier	Created By	Last Modified On	
<input type="checkbox"/>	<a href="#">UC Terms and Conditions</a>	Terms and Conditions	Before participating in event	Adrian Ferreira	06/06/2018 9:23 AM	<a href="#">✎</a>
<input type="checkbox"/>	<a href="#">Supplier Bid Response Quick Re...</a>	General Guidelines	Before participating in event	Adrian Ferreira	06/06/2018 9:23 AM	<a href="#">✎</a>
<input type="checkbox"/>	<a href="#">UC Sustainable Practices</a>	General Guidelines	Before participating in event	Sara Kayser	06/06/2018 9:36 AM	<a href="#">✎</a>

### REARRANGE GUIDELINES

1:	UC Terms and Conditions
2:	Supplier Bid Response Quick Reference Guide
3:	UC Sustainable Practices

[CANCEL](#) [DONE](#)

# Contracts Enhancements

## Rearrange Contract Language

Previously, contract language templates would default in a specific order which would result in documents not being arranged appropriately. Now, you have the ability to reorder contract language templates in the order of your preference by dragging and dropping. This is done when authoring the contract. Once executed, the contract language will stick in the order in which you arranged it.

The screenshot shows a software interface for contract rearrangement. At the top, a blue header bar contains a back arrow, a pencil icon, and the text 'CONTRACT REARRANGEMENT (DRAFT)'. Below the header, a dropdown menu is open, showing 'CONTRACT LANGUAGE - Authoring [x]'. The main area contains a table with columns for Name, Comments, Contract Administrator, Modified By, Type, Modified On, and Version. There are three rows of data. To the right of the table, there are icons for download, delete, refresh, and add. At the bottom, there are three buttons: 'PREVIEW', 'CANCEL', and 'SEND FOR TEAM REVIEW'.

	<input type="checkbox"/>	Name	Comments	Contract Administrator	Modified By	Type	Modified On	Version
1	<input type="checkbox"/>	Purchasing, Independent Contractor, Prof..		Kathy Mills	Kathy Mills	Newly Added	10/09/2018	1
2	<input type="checkbox"/>	Appendix- eCommerce1		Kathy Mills	Kathy Mills	Newly Added	10/09/2018	1
3	<input type="checkbox"/>	Appendix- Business Associate1		Kathy Mills	Kathy Mills	Newly Added	10/09/2018	1