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
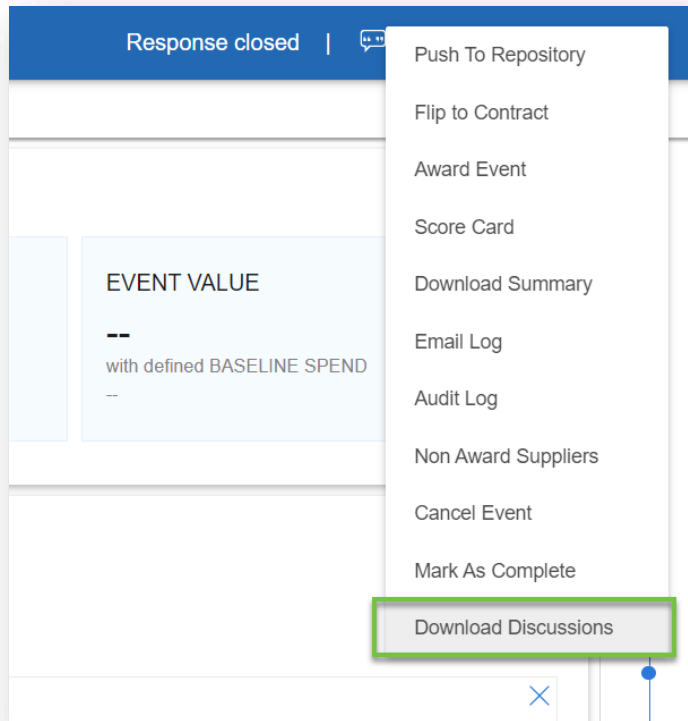- Ability to Rearrange the Guidelines and Questionnaires

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. Morning 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.

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.