

# CALUSOURCE

— Collaborative Procurement



Loading a  
Presigned Agreement  
Online Training Guide

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## Loading a Presigned Agreement Online Training

This training guide is designed to accompany the **Loading a Presigned Agreement (when your supplier is not in CalUsource)** online training available on the [CalUsource website](#). Viewing the online training while following along with this guide will help get you up and running on all tasks related to loading a presigned agreement into CalUsource.

This training is designed to be self-directed. We estimate that it will take 20 to 30 minutes to complete the entire training.

### How to Use this Guide

- **As a point of reference as you view the online training.** We recommend you use this guide to follow along with the online training to help you remember key points the instructor makes.
- **Just in time support when creating contract documents.** Use this guide whenever you need basic guidance for loading presigned agreement tasks.

Each topic of this guide (listed in the Table of Contents) corresponds to a section of the Loading Presigned Agreements online training. It also contains links to Quick Reference Guides for detailed instructions on completing specific tasks.

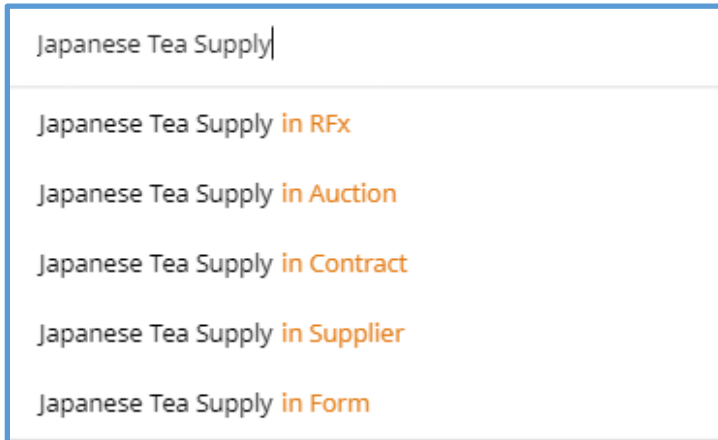
### Learning Objectives

Upon completing this training, you will be able to identify the procedural steps to:

- Search for a CalUsource supplier profile.
- Create a CalUsource supplier profile.
- Submit a supplier for approval in CalUsource.
- Load a presigned agreement into CalUsource.

## Searching for a Supplier

The first step in creating a presigned agreement is to search for the Supplier in CalUsource.



A screenshot of a search dropdown menu. The search input field contains the text "Japanese Tea Supply". Below the input field, a list of search results is displayed, each with the text "Japanese Tea Supply" followed by a status in orange text: "in Rfx", "in Auction", "in Contract", "in Supplier", and "in Form".

If your Supplier already exists in the platform, the next step is to determine their status. The status of the Supplier will determine which steps you follow below.

### Search for a Supplier:

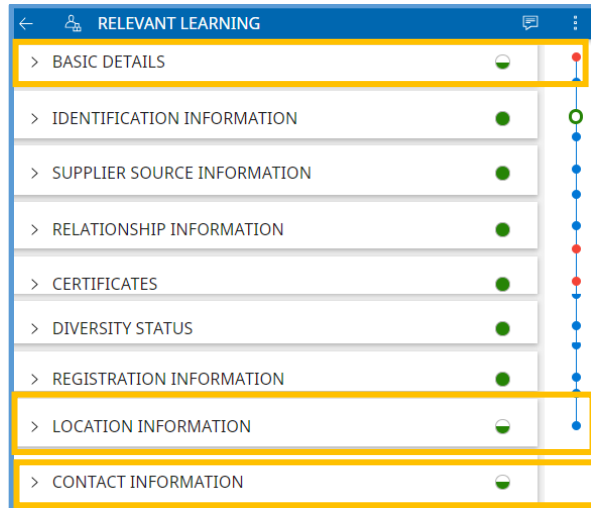
1. Type the Supplier's name in the **Main Menu** search field.
2. Select the results for **in Supplier**.
3. If the Supplier's name does not display, you must create a Supplier profile. (See instructions on Page 5)
4. If the Supplier's name displays, click on their name to display their profile.
  - If the Supplier's status is **Identified**, **Invited** or **Registered**, you will need to submit the Supplier for approval. (See instructions on Page 7)
  - If the Supplier's status is **Approved** or **Normalized**, proceed to loading the presigned agreement. (See instructions on Page 8)

For additional information on searching, see the [Searching for a CalUsource Record QRG](#).

## Creating a Supplier Profile

If your search did not locate the Supplier, you will need to create a Supplier record to associate it with your contract. The process of creating a profile is mostly the same as the normal supplier creation process, except that you can bypass registering the supplier.

The required fields for creating a profile are in the **Basic Details**, **Location Information** and **Contact Information** sections.



### Create a Supplier Profile:

1. Click **Create** on the Main Menu.
2. Click **Supplier Profile** on the Create Menu.
3. In the **Basics Details** section, enter the Supplier's:
  - Legal name**
  - Category** (Select Edit and check the boxes to change the category, then click **Done**.)
4. Uncheck the **Send Invitation** checkbox to complete the remaining required information yourself. Keep the checkbox checked to allow the supplier to complete the profile.
5. Click **Submit**. This creates the Supplier Profile with a status of "identified."
6. Enter the Supplier's name in the Search field on the Main Menu, select their name next to Supplier and lick on the supplier name in the list of suppliers that displays.
  - The Supplier's Profile displays. Required sections are identified by red dots on the right.
7. Display the **Supplier** list and click on the supplier profile you just created to display it.
8. In the **Contact Information** section:
  - Enter your name or the name of the Supplier's primary contact in your organization in the **Supplier Manager** field and select the name from the list that displays.
  - In the **Region field**, select the campus(es) the Supplier does business with.

9. In the **Location** section:

- Click the **Pencil icon**.
- Complete the following fields in the **Edit Headquarter** popup.
  - Address Line 1       City       State
  - Country       Zip Code       Primary Business Phone

10. Click **Save**

11. In the **Contact Information** section:

- Click on contact's **Name** to edit Supplier contact
- Enter the Supplier contact's phone number in the **Phone Number** field
- Click on **Region** (campuses) that the contact does business with
- Click **Save** (bottom right).

12. Click **Save** in the bottom right of the **Supplier Profile** screen.

13. From **Actions** menu, click '**Submit for Approval**.

14. The Supplier goes through a 24-hour duplication check. The person identified as the Supplier Manager will receive the email notification once approved. If it takes longer than 24 hours, contact [CalUsupport](#) for assistance.

### **Checking the Status of an Approval Request.**

1. In the Supplier profile's **Contact** section, click **View Track Status** in the **Action** menu.
2. The approval status is displayed in the Track Status window.

See the [Inviting New Suppliers QRG](#) for information on creating a new Supplier.

**Note:** This QRG provides instructions on creating a Supplier profile and inviting a Supplier. Inviting a supplier is not recommended for loading a presigned agreement.

## Submitting a Supplier for Approval

CalUsource will not allow Suppliers with an **Identified**, **Invited** or **Registered** status to be entered in a contract document, including presigned agreements.

You must first submit the Supplier for approval and wait for the approval to go into effect before entering the Supplier into the contract.

The screenshot shows the 'BASIC DETAILS' section of a supplier profile. On the left is a placeholder for a company logo with supported file formats (png, jpeg, jpg) and a 5MB limit. Below the logo is the 'Supplier Managers' field, currently showing 'Joanne Petersen'. The main form area contains several fields: 'Supplier's Legal Name' with a 'Relevant Translations' sub-field; 'Parent Company's Identification Type' with a dropdown menu set to 'Parent Company Name'; 'Doing Business As'; 'Normalised Name'; 'Category' set to 'PROFESSIONAL SERVICES'; 'Org. Entity' set to 'Procurement'; 'Orignation' set to 'SMART by GEP'; and 'Choose Region'. The 'Status' field is highlighted with a yellow box and a red arrow, displaying 'Invited' with an information icon.

### Submitting a Supplier for Approval:

1. Locate the Supplier by entering their name in the **Main Menu** search field and select the results for **in Supplier**.
2. If the Supplier's name displays in the list, click on their name to display their profile.
3. Check the **Basic Details** section to ensure the **Supplier Manager** field is completed. If not, enter your name or the name of the person that will be the primary contact for the supplier.
4. In the **Location** section of the profile, select your region in the **Region** field.
5. In the **Contact Information** section:
  - Click on contact's **Name** to edit Supplier contact.
  - Enter the Supplier contact's phone number in the **Phone Number** field.
  - Click on **Region** (campuses) that the contact does business with.
  - Click **Save** (bottom right).
6. Click the **Submit for Approval** button at the bottom of the page or click **Submit for Approval** on the **Action** menu. Both of these actions submit the Supplier for approval.
7. Click **View Track Status** in the **Action** menu to check the status of the approval.
8. The approval status is displayed in the **Track Status** window.

For additional information, see the [Submitting a Supplier for Approval QRG](#).

## Loading a Presigned Agreement

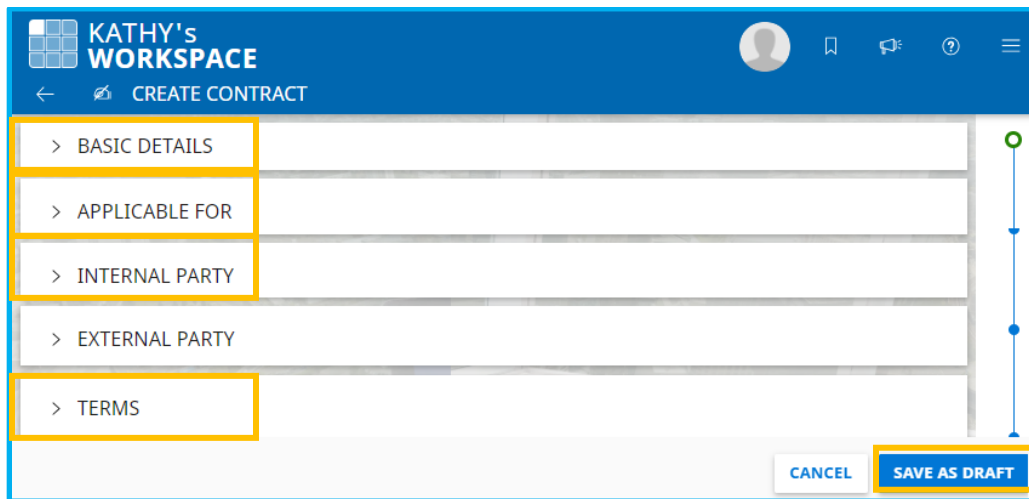
The process for loading a presigned agreement is very similar to the process of the initial contract creation when you author a contract in CalUsource from scratch.

You do not need to wait until a Supplier is approved to begin the process of loading a presigned agreement into CalUsource.

You can complete the majority of the required information while you are waiting for approval and complete the process once the supplier is approved. You also have the option of waiting until the supplier is approved to load the presigned agreement all at once.

### Loading a Presigned Agreement: Part 1

Complete the contract coversheet



The screenshot shows the 'CREATE CONTRACT' interface in 'KATHY's WORKSPACE'. The interface features a blue header bar with a user profile icon and navigation icons. Below the header, there are five expandable sections: 'BASIC DETAILS', 'APPLICABLE FOR', 'INTERNAL PARTY', 'EXTERNAL PARTY', and 'TERMS'. Each section is currently collapsed, indicated by a right-pointing chevron. At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE AS DRAFT'.

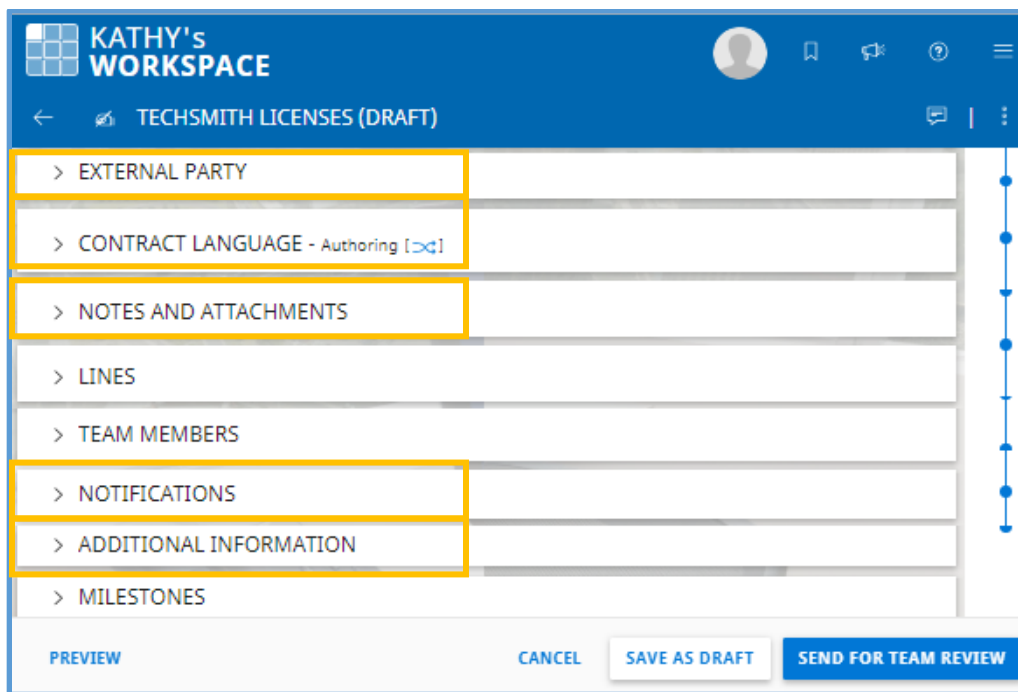
1. Click **Create** from the Main Menu and select **Contract**.
2. Select **Using Blank Form**.
3. In the **Basic Details** section:
  - Fill out a name for your contract in the **Contract Name** field.
  - Select the most appropriate contract type for the goods and services being contracted in the **Contract Type** field.
  - Enter a description of what the contract entails in the **Description** field.
4. In the **Applicable For** section:
  - Select the appropriate **Category** for the contract. (Skip this step if the correct category displays.)
  - Click the name that displays in the **Region** field. (Skip this step if the correct campus/campus system displays.)



5. In the **Terms** section:
  - Write an estimated contract value in the **Contract Value** field.
  - Select the **Payment Term** for the contract.
  - Enter a date you want the contract to become effective in the **Effective Date** field.
  - Complete the contract duration in the **Remain in Effect** field. You have the option of using a specific period of time or a specific date.
  - If **To Date** is selected, enter the end date of the contract.
  - If **for period of** time is selected, enter a number in the **Effective Period** field and select the period of time.
6. Click **Save as Draft**. As a result:
  - The contract coversheet is completed and saved and a contract number is generated. New fields will display after the draft is saved.
7. Click **OK** in the Success popup that displays.

## Loading a Presigned Agreements: Part 2

### Load the Presigned Agreement



1. Open the **Contract Language** section.
2. Click the double arrow icon in the **Contract Language** section.
3. Change the **Change Mode** from **Authoring** to **Pre-signed** and then click **Change**.
4. Click **Upload Documents**.

5. Drag and drop the pre-signed contract along with any supplemental attachments and notes, such as price sheets, COI, etc. if applicable in the space provided.
6. Click **Close** when you are finished uploading the documents.

### Loading a Presigned Agreement: Part 3

#### Part 3: Complete the Contract Draft

1. In the **Internal Party** section:

- Click the name that displays in the **Authorized Signatory** field and type the first few letters of the authorized signatory for this contract.
- Select up to three names. If your authorized signatory's name does not display, contact [CalUsupport](#) to have that person granted the appropriate persona to be an authorized signatory.
- Click **Done**.

2. Complete the **External Party** section.

**Note:** This section can only be completed once the supplier is approved. If the Supplier is not approved, you will need to save the document as a draft and return and enter this information upon Supplier approval.

3. In the **External Party** section complete the following fields:

**Note:** You should only complete this section if the Supplier has already been approved. Otherwise, wait until you complete the contract draft as outlined below and return to the contract once executed, per Step 8.

- Enter the Supplier's name in the **Supplier** field and select their name from the list.
  - If the Supplier's name does not display, either the Supplier is not in CalUsource or they have not been approved, which is required for the supplier to contract in CalUsource. If this is the case, you will need to get the supplier approved. (See the [Submitting the Supplier for Approval QRG](#) for these instructions.)
- Select the name that matches the Supplier contact you are working with on this contract.
  - If the Supplier contact for this contract does not display, click the **+ icon** to display the **Add Contact** popup and complete the required fields.

4. In the **Notes and Attachments** section add notes, attachments and URLs as needed.

5. In the **Notifications** section:

- To activate or deactivate one of the default notifications, click the toggle in the **Status** column and click **Yes** in the Confirmation message.
- To edit a notification, click the Pencil icon and edit the information that displays. Click **Close** when you have finished.

- To create different notifications besides the default notifications, click the **Plus icon** and complete the fields in the popup that displays. Click **Close** when you have finished.
6. Complete the **Additional Information** section.
- Click each of the four tabs.
  - Review the questions in the **Additional Information** section.
    - Answer all required questions (marked with a red asterisk.)
    - Answer any applicable questions related to your contract.
  - Click each tab and review the fields for required questions (marked with a red asterisk) as well as other questions that may apply to your agreement.
  - In the **General** tab:
    - Select the home campus you are acting on behalf of in the **Campus Contract Originating At** field.
    - Select the appropriate contract type in the **Procurement Type** field. The glossary at the end of this document lists contract type definitions.
    - Certain fields only have **Yes** as an option. If these fields do not apply, or if the answer to the question stated is No, do not complete these fields.
    - Responses to certain questions will generate a follow up question.
7. If the supplier is already approved, click **Execute**.
8. If the supplier is not yet approved, click **Save as Draft** and complete the following steps.
- Wait until you get an email notification that the supplier has been approved.
  - Click **Tasks** in the **Main Menu**.
  - Open the contract in the **Drafts** list.
  - Add **External Party** information. (see Step 3 above)
  - Click **Execute**.

**Note:** You will not be able to complete the agreement until the supplier has been approved.

For more information, see the [Loading a Presigned Agreement QRG](#).