

## Adding Guidelines

This section allows you to add guidelines for suppliers to review before launching the RFx. Guidelines are documents that suppliers must agree to before entering the RFx. There are two ways to add guidelines: 1) selecting and editing an existing guideline from the repository, or 2) creating a new guideline that you created yourself by uploading a document or using the text editor in the system.

### Importing a Guideline from the Repository

1. Click **Import from Repository**.



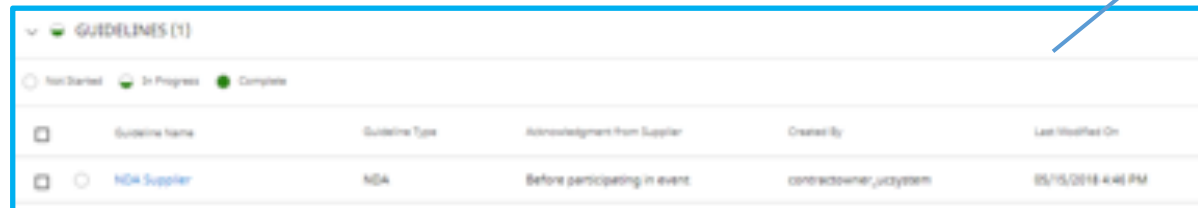
2. Check the box for the guideline you want to import. (You can check as many guidelines as you need)

3. The body of the guideline displays in the main window. (Certain guidelines will have links to the document).

4. Click **Import**.



5. Once the guideline has been imported it will be listed in the Guidelines section of the RFx.



## Instructions for adding a New Guideline

1. Click **Create New Guideline**.
2. Give your Guideline a title that is easy for suppliers to understand in the **Guideline Title** field.
3. Select the type of Guideline in the **Guideline Type** dropdown list (General Guidelines, Privacy Policy, Terms of Service, Legal Policy, Terms and Conditions, Other).
4. Select “Before participating in event” from the **Acknowledgement from Supplier** dropdown if you want to require the supplier to acknowledge the guideline prior to the event.
5. In the text box, enter the content for the guideline. You can also add an attachment using the **Add attachment** link which allows you to upload or drag or drop a guideline to attach to your RFx document.
6. To save the guideline, click **Save**.
7. Click **Done**.

The screenshot shows the 'Add New Guideline' form in the CalUsource system. The form is titled 'Add New Guideline' and contains several fields and options. A blue box highlights the 'Create New Guideline' button in the top right corner, with a callout '1'. Below this, the 'Guideline Title' field is highlighted with a callout '2'. The 'Guideline Type' dropdown menu is highlighted with a callout '3', and the 'Acknowledgement from Supplier' dropdown menu is highlighted with a callout '4'. The 'Add Attachment' link is highlighted with a callout '5'. The main text area for the guideline content is highlighted with a callout '6'. The 'Save' and 'Done' buttons are highlighted with a callout '7'. The form also includes a 'Mark as Complete' checkbox and a 'PREVIEW' button at the bottom left.

## Tips

- To help facilitate compliance, it's best practice to configure your essential guidelines so the supplier must acknowledge them prior to participating in the event. Do this by using the **Acknowledgement from Supplier** dropdown and select **Before participating in event**.
- If you have a qualification for participating in the RFx, add it as a guideline. If suppliers cannot attest to the guideline, it will disqualify them.