Quick Reference Guide

CALUSOURCE Collaborative Procurement

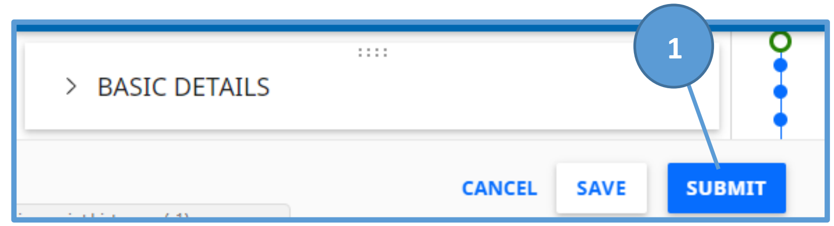
Publishing and Editing a Sourcing Event

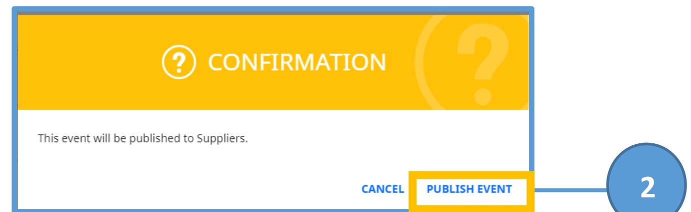
After an RFx has been developed, the next step is to "publish" it so that invited suppliers will receive an email announcing that the RFx has been released for their review. Other supplier will be able to search for it on the Public RFx site. The 2nd page of this QRG addresses editing published events.

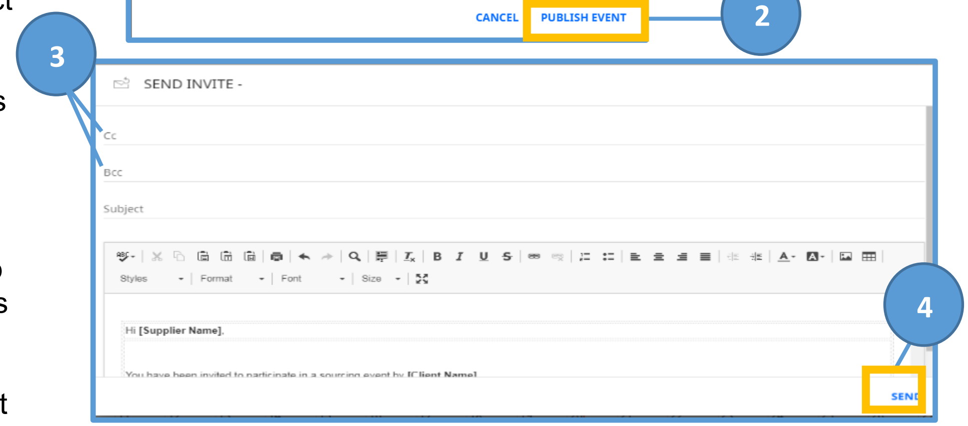
Instructions for publishing a sourcing event

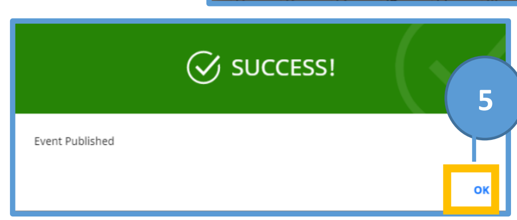
1. When the RFx development is complete, select **SUBMIT** from the bottom right of the screen.
   Note: To publish an RFx, it must include a questionnaire or price sheet.
   - All questionnaires must assign all mandatory question a weight so that the total questionnaire weight equals 100.
   - All price sheets' must have at least 1 column containing data and any Mandatory columns must be filled.
2. The site will provide a confirmation before the RFx is released. Select **PUBLISH EVENT** on the confirmation screen.
3. The system will generate a standard email. You can edit the information on the **SEND INVITE** email as needed. The To field does not display because the email automatically is sent to all supplier contacts listed in the RFx. You can include other recipients to the email notification by adding their addresses to the **Cc** and **Bcc** lines.
4. Select **SEND** to send the email.
5. If the event is successfully published, a **SUCCESS** message will pop up. Select **OK** to close the message and complete event publications so that the event is available for supplier review.
6. If you have not completed the event correctly an **ERROR** message will display and reference the section where there is an issue. Select **OK** to close the message.

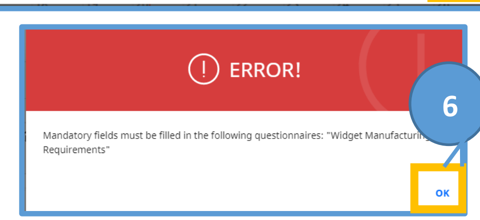
   Notes: You will be returned to the event to fix the issue. The event cannot be published until the issue is resolved. See "Published Event Tips" on page 3 of this QRG for more details.











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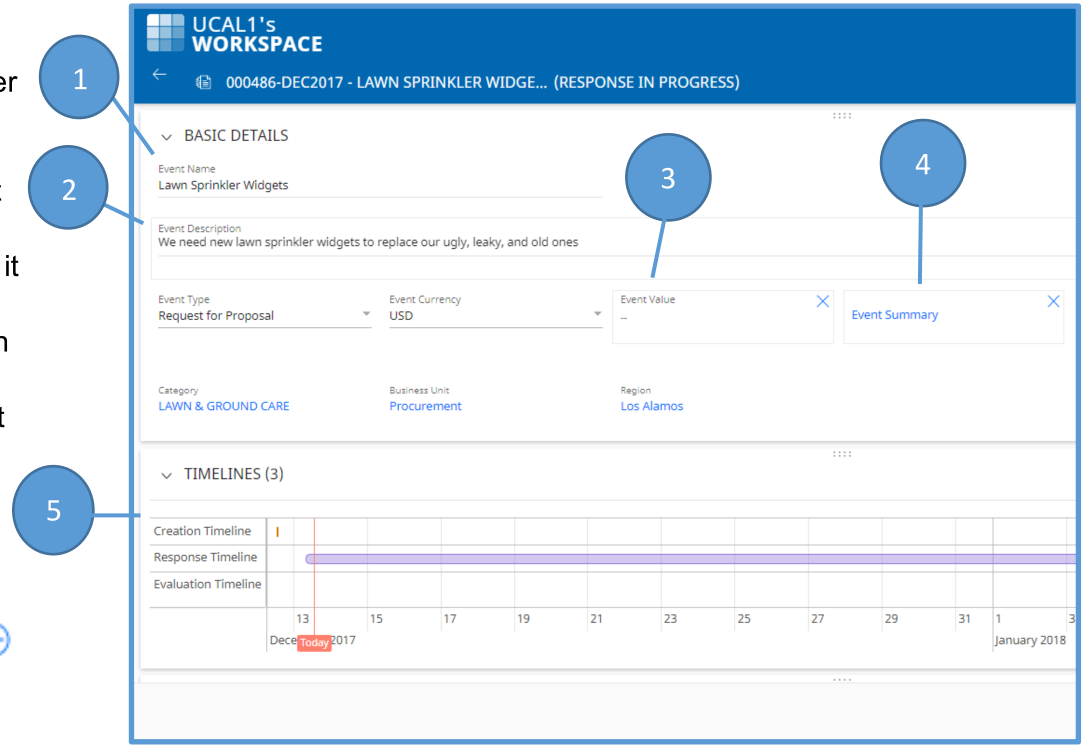
How to edit an event after publishing

Minor changes are permitted for the following event fields without the need to withdraw the event. For other change(s) you must withdraw the event, make the change(s) and then republish the event.

1. Be careful when editing the **Event Name** so that it is still identifiable by others.
2. You can edit the **Event Description** field to make it accurately describes the event.
3. You cannot edit the **Event Value** field, but you can delete it by selecting the **X**.
4. You can upload a new event summary attachment in the **Event Summary** field or delete this field by selecting the **X**.
5. Click on any of your timelines displayed in the **Timelines** to change the dates.
6. **Suppliers and Team Members**. Click the Add Icon to the right of the supplier or team member ⊕ section to add supplier(s) or team member(s).



See "Published Event Tips" on page 3 of this QRG for more details.

Publishing Event Tips

- If you receive an **ERROR** message when publishing an event, the message will point you to the section that has a setup issue, but does not always provide details on what the specific issue is. Common issues include:
  - Question weightings do not add up to 100%.
  - Not all questions have been assigned a score. This only applies for Mandatory questions with pre-set responses, not free-form text field responses.
  - Other required information is missing, such as a question was not flagged as either Mandatory or Informative.

Editing Publishing Event Tips

- If you add supplier(s) or team member(s) after an event is published, they will not automatically be notified. You will see "**Not Invited**" under their Participation/Invitation Status. Simply click on the **Invite Icon** (envelope shaped graphic) to send uninvited people a notification that they have been added/invited to the event.
- CalUSource does not have an "Amend" feature. You can simply make any of the above minor changes directly within the event after publishing.
  NOTE: of the minor changes mentioned above, only changes to the timeline(s) will trigger a notification to your suppliers.
- To make a change not included within the minor changes noted above, you must first withdraw the event by selecting the Action icon in the top right corner and then select **Withdraw Event** from the drown-down menu. You can then make your change(s) and click the **Resubmit** button in the lower right of your screen.
- Suppliers will receive notifications of the event once it is withdrawn and also when it is re-published.