

**CALUSOURCE**  
— Collaborative Procurement

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**Supplier Guide**

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## GETTING STARTED WITH CALIFORNIA HIGHER EDUCATION

The University of California welcomes suppliers interested in doing business with us and strives to provide efficient and equitable sourcing opportunities.

### CalUsource Collaborative Procurement

To participate in bidding and supplier activities with the University of California, potential suppliers must register in CalUsource – the collaborative web-based eProcurement platform used by the University of California.

Whether you are already a supplier for the University of California or are exploring working with us for the first time, CalUsource will help make your experience in bidding and contracting with us more streamlined.

### Accessing and Using CalUsource

The [CalUsource website](#) and this guide have all the information and resources you need to use CalUsource effectively, including the [CalUsource Public Bid Site](#).

To participate in University of California bidding events and to access contract documents, you must first register in CalUsource.

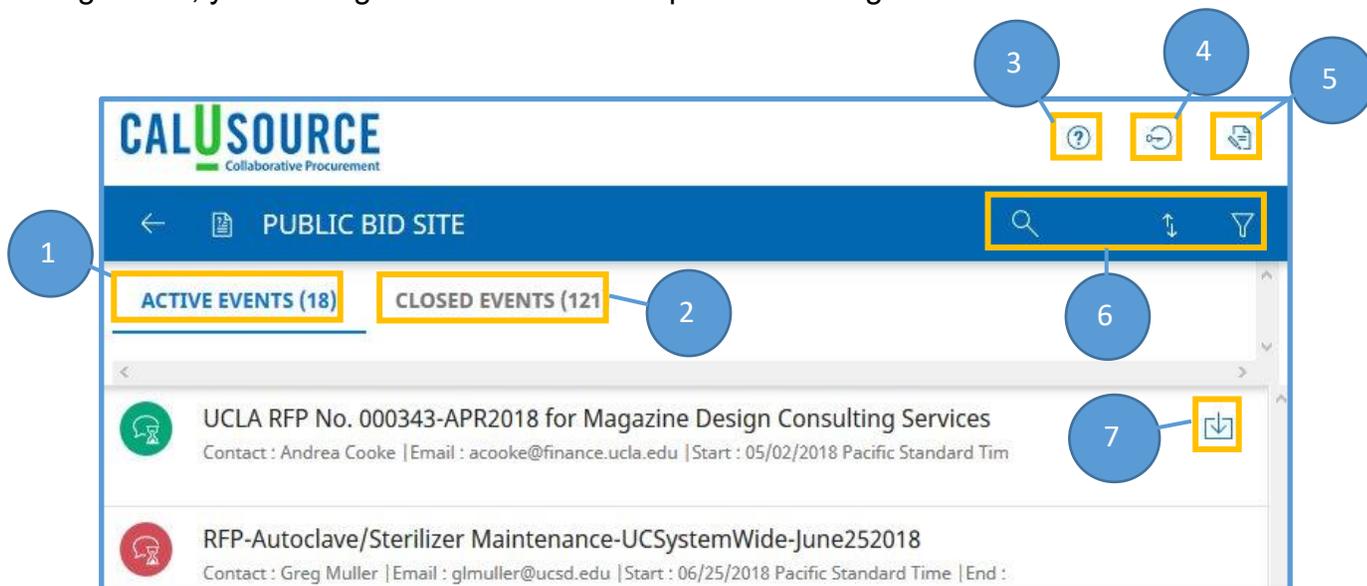
This guide leads you step-by-step through:

- Navigating, searching for bids, and selecting a bidding event on the Public Bid Site
- Registering as a CalUsource supplier
- Adding additional company contacts
- Updating your company's CalUsource profile
- Updating your user profile
- Navigating CalUsource
- Submitting a bid
- Posting and participating in the event's bidding discussion forum
- Withdrawing and resubmitting a bid
- Reviewing, editing and signing your UC contract
- Getting help

## USING THE PUBLIC BID SITE

The [CalUsource Public Bid Site](#) is where you can browse public bid opportunities for all University of California campuses. You can also access the Public Bid Site from the [CalUsource website](#).

The Public Bid Site lists all active and closed public sourcing events. On this site, you can also register in CalUsource so you can participate in bidding events. Once registered, you can login to the CalUsource platform through the Public Bid Site.

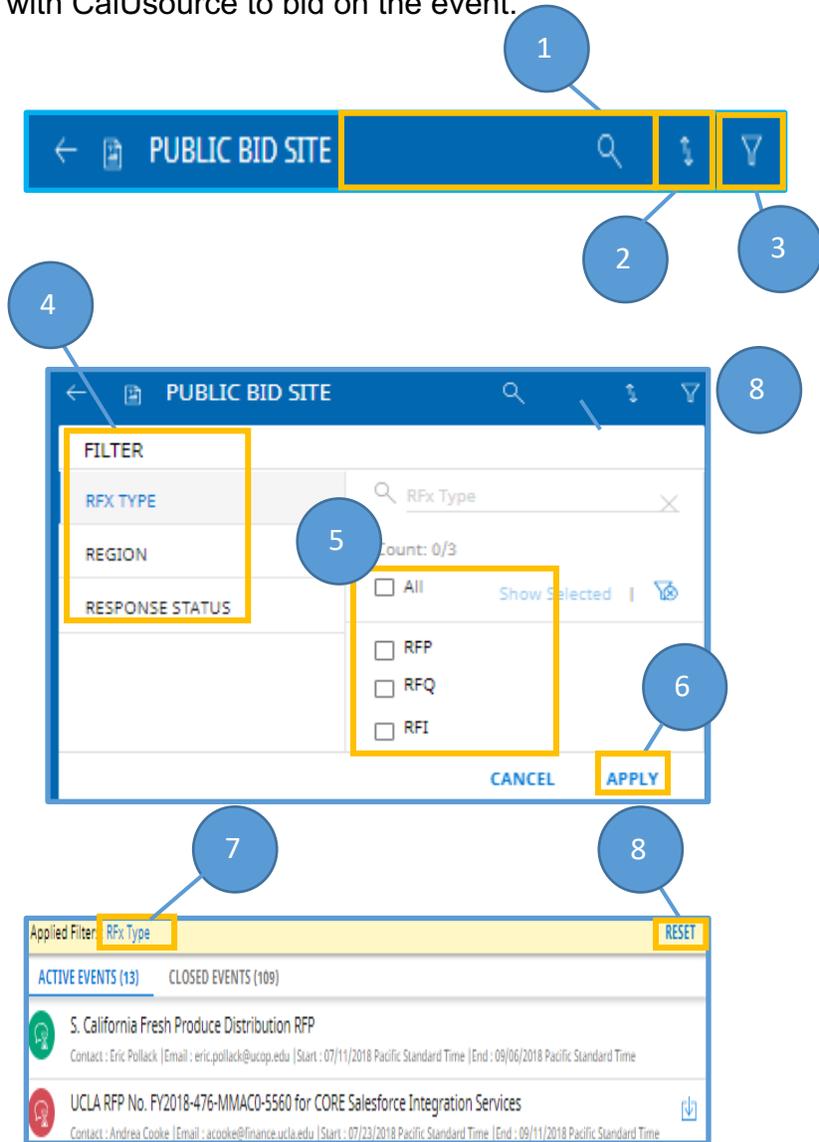


1. **Active Events** Displays all active CalUsource events available for bidding.
2. **Closed Events** Displays all CalUsource events that have been awarded or closed.
3. **Help icon** Opens CalUsource support contact information.
4. **Login icon** Opens the CalUsource login screen.
5. **Register icon** Opens the CalUsource Primary Registration Form so you can register your company in CalUsource.
6. **Search, Sort and Functions** Helps to locate an event. (See next page for more details.)
7. **Download Event Summary icon** (If available) Downloads the Event Summary, which provides background, instruction and other details.

## Searching for Bid Opportunities

Follow these instructions to explore bidding opportunities for your company on the [CalUSource Public Bid Site](#). **Note:** Once you have identified a bidding opportunity, you must register your company with CalUSource to bid on the event.

1. Enter **search terms** for the product or services you wish to provide.
2. Click the **Sort icon** to sort events by 'Response Start Date' and 'Response End Date' in either ascending (starts with earliest date) or descending (starts with latest date) order.
3. Click the **Filter icon** to display a set of events.
4. Select the filter type on the left.
5. Select additional filtering option on the right. (Options vary based on the filter type selected in Step 5.)
6. Click **Apply**.
7. The filtered results display. **Applied Filters** in the yellow bar on the top of the screen tells you which filters have been applied to the search results.
8. Click **Reset** to remove the applied filters.



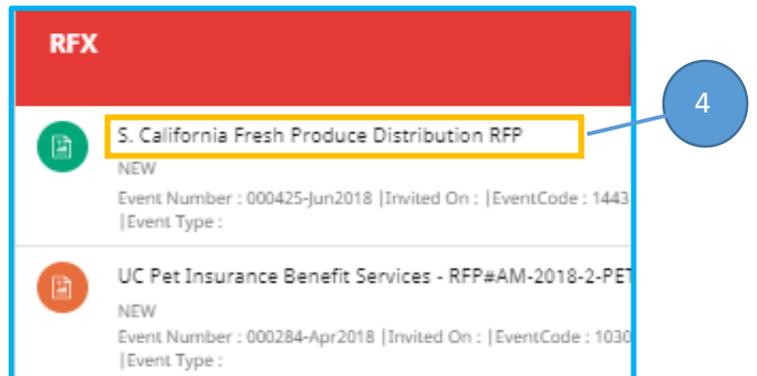
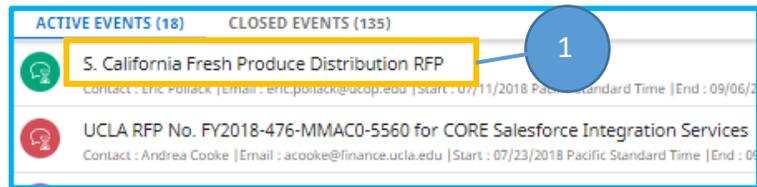
## Selecting an Event to Bid On

Once you have identified an event, you can bid on it if you are registered with CalUsource. (See registration instructions on page 8 of this Guide.) Follow the instructions below to select an event on the CalUsource Public Bid Site and display it in CalUsource.

1. Copy the RFX event name shown in the **Active Event** listings.
2. Click the **Login icon** and log into CalUsource with your login credentials.
3. Paste the name of the RFX into the Main Menu **search field** and press Enter.
4. Click on the event in the **RFX Card\***.
5. The RFX event you selected will display.

**\*Note:** If you are already registered with CalUsource, you can search from **Projects** in the **Manage** section to access bidding events as well.

(See pages 12 through 22 for instructions on 'Participating in an RFX.')



## REGISTERING WITH CALUSOURCE

Registering in CalUsource offers you the opportunity to participate in sourcing events within the University of California systems. These events may be system-wide, multi-campus or campus-specific. Registration is available through the registration icon on the [CalUsource Public Bid Site](#).

**All you need to register is:** (**Note:** Fields marked with a red asterisk\* in registration form are required)

Your Company Information		Company Contact Information	Contact Login Credentials
<ul style="list-style-type: none"> <li>• <b>Company Name</b> (Legal)</li> <li>• <b>Headquarters</b> (Country)</li> <li>• <b>Street Address</b></li> <li>• <b>City</b></li> <li>• <b>Phone #</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Business Region</b> (Campuses you'd like to work with)</li> <li>• <b>Category of Business</b> (Commodity Classifications)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>First/Last Name</b></li> <li>• <b>Email Address</b></li> <li>• <b>Phone #</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Username</b> (6 characters min.)</li> <li>• <b>Password</b> (10 characters, w/upper &amp; lowercase, a number &amp; symbol).</li> </ul>

### CalUsource Registration Process:



There are three different starting points for registration in CalUsource:

Registration Method	Starting Point
<b>Self-registration</b>	From the <a href="#">CalUsource Public Bid Site</a> , click on the <b>Register icon</b> in upper right corner to open and complete the registration form. 
<b>By Bid Invitation</b>	You receive an email invitation to register with a request to bid from an RFx author, or upon your own request to bid on a sourcing event.
<b>By Invitation-not related to bid</b>	You receive an email invitation to register when someone from your company has added you as a new contact in CalUsource.

## Registration Steps

No matter how you start the registration process, the icon or link will open the Primary Registration Form. This form is simple and asks for the following basic information.

1. Complete the **Account Credentials** section with your login information.
2. Complete the basic **Company Information** section.
3. For **Business Regions**, click the **Region icon**, then click the **Plus icon**. Select campuses your company hopes to do business with. Click **Done**.
4. For **Category**, click the **Add Category icon**. Check all categories for which your company is able to provide materials and/or services.
5. Complete the **Contact Information** for the primary person responsible for responding to RFxs.
6. For **Contact's Business Region**, select the campuses the contact hopes to do business with.
7. For **Contact's Category**, check all applicable categories of materials and/or service.
8. Review the **Terms & Conditions** and **Privacy Policy**. Mark the **checkbox**.
9. **Submit** the Registration form.

Account Credentials

Username \*  ⓘ

User Email \*

Password \*  Password strength: Too short

Confirm Password \*

Legal Company Name \*

Doing Business As

Company Website

Headquarter \*  Select Country ▾

Address Line 1 \*  Suite, Street, Locality

Address Line 2  Suite, Street, Locality

City \*

State/Province

Zip/Postal Code

Company Phone \*

Fax

Business Regions \*  ⓘ

Category \*  ⓘ

D-U-N-S Number  9 Digit D-U-N-S

OR

Company Identification  Select identification type ▾ Identification Nur +

Contact Information

First Name \*

Last Name \*

Company Email \*

Primary Business Phone Number \*  Extension

Contact's Business Region \*  ⓘ

Contact's Category \*  ⓘ

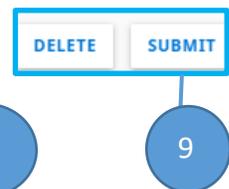
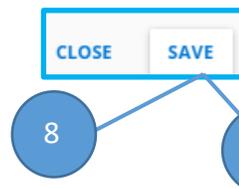
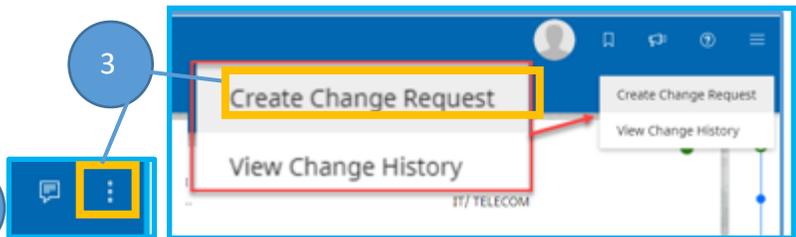
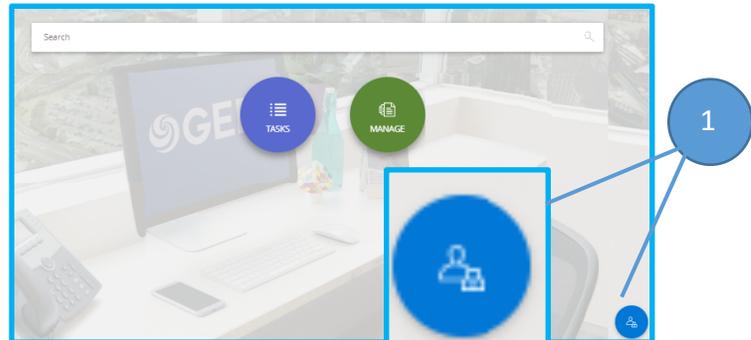
Time Zone (UTC+00:00) Dublin, Edinburgh, Lisbon, London ▾

I have read and agree to [GEP Terms & Conditions & Privacy Policy](#).

## Adding Additional Supplier Contacts

Once you are registered with CalUsource, you can add colleagues to your company's Supplier profile so they can also view and participate in bids and contracts.

1. Select the **Supplier Profile icon** in the lower right corner of the Main Menu.
2. Note your company status in the **Basic Details** section. Your status affects which steps to complete.
3. **For Normalized/Approved Status Suppliers Only:** Click the **Actions Menu** in the right and then select **Create Change Request**.
4. Click the arrow to expand the **Contact Information** section that displays halfway down the screen.
5. Select the **Plus icon**.
6. Complete all fields with red text in the **Add New Contact Form**. Scroll down to see the **Global** and **Region** fields (required).
7. Ensure "**Send Invitation**" is checked (**not needed for Normalized/Approved suppliers.**)
8. Click **Save**.
9. **For Normalized/Approved Suppliers:** Click **Submit** (at bottom of the screen). A pending approval message displays. **Important:** Refresh your browser until the message disappears. Your contact will be added and receive an invitation to register in CalUsource.
10. Click **Save**.

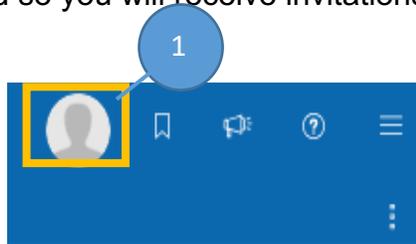


## Updating Supplier Profile General Settings

CalUsource uses the information provided in registration to create your supplier profile.

It's important to keep your profile updated so you will receive invitations to participate in CalUsource bidding events.

1. Login to [CalUsource](#) and click the **Supplier Profile icon** in the upper right of the screen.



2. Edit the information in the **Account Settings** as needed.
3. Edit **Regional Settings** sections, as needed.
4. Enable your electronic signature in the **Electronic Signature Settings** section.

**Account Settings**

First name*	Last name*
Alan	Wootner
User Email*	Username
alan.wootner@ucop.edu	AWOONTNE

[Change Password](#)

- Click the check box to enable your **Electronic Signature**.
- Check the box to identify if the signature is applicable for **Contract** and/or **Procurement**.
- You have the option of either creating a signature on this screen or uploading a signature file.
- Click **Set Signature Password** to enter your password for the first time or change your password.

**Regional Settings**

Time Zone	Language
(UTC+05:30) Chennai, Kolkata, Mumbai, New D...	English

**Electronic Signature Settings**

Enable Signature

Available For  Contract  Procurement

Create Signature  Upload Signature

alan wootner B

alan wootner

[Set Signature Password](#) ⓘ

[Cancel](#) [Save](#)

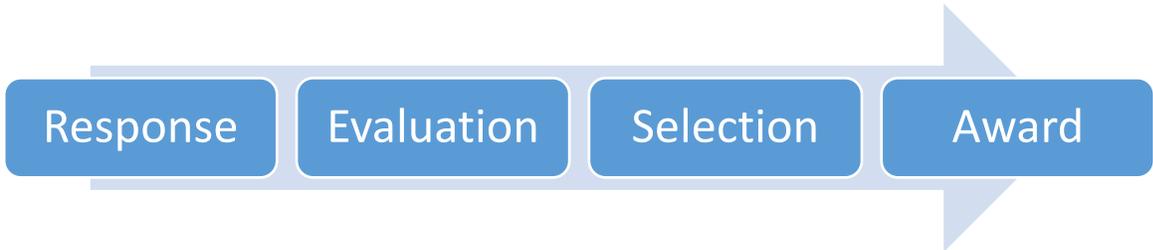
5. Click **Save** when you are finished updating your profile.

## PARTICIPATING IN AN RFX

CalUsource uses the term **RFX** to describe an online sourcing event. An RFX might be a Request for Information (RFI), a Request for Quote (RFQ), a Request for Proposal (RFP), or an Auction. The University of California institutions use CalUsource to create an RFX and invite suppliers to submit a bid.

### Overview of the RFX process

The following diagram shows the major phases in the RFX process once a bid is closed. An RFX document’s Timeline section (described on Page 17) provides a graphic representation of the time periods of each phase of the RFX.



<p><b>Response</b></p>	<p>During the Response phase, invited suppliers can prepare and submit a bid for the RFX. During this phase, suppliers can revise their bids in response to information posted in the Discussion Forum or as desired to improve their chances of being selected. The RFX includes a bid clock that displays how much time is left to submit a bid the event. As long as the RFX is in the Response phase, you can withdraw and resubmit your bid.</p>
<p><b>Evaluation</b></p>	<p>The RFX’s commodity manager can also include an Evaluation period after the Response phase to analyze bids. During this period, a team of evaluators will follow a structured practice to assess each supplier’s responses. During this time, the commodity manager may reach out to suppliers for additional information on their bids. The buyer might negotiate with suppliers and make agreed-upon adjustments to their bids before the event moves into the Pending Selection phase.</p>
<p><b>Selection</b></p>	<p>After the Evaluation period closes, the RFX moves to the Selection phase. During this time, the commodity manager reviews bids and scores to make the final determination of which supplier(s) will be awarded a contract.</p>
<p><b>Award</b></p>	<p>During the Award phase, the supplier selection is formalized and documented. At this point, negotiation and contract creation begins.</p>

The rest of this section describes the steps included in each phase of the RFX process.

## Supplier RFX Bidding Tasks in CalUsource

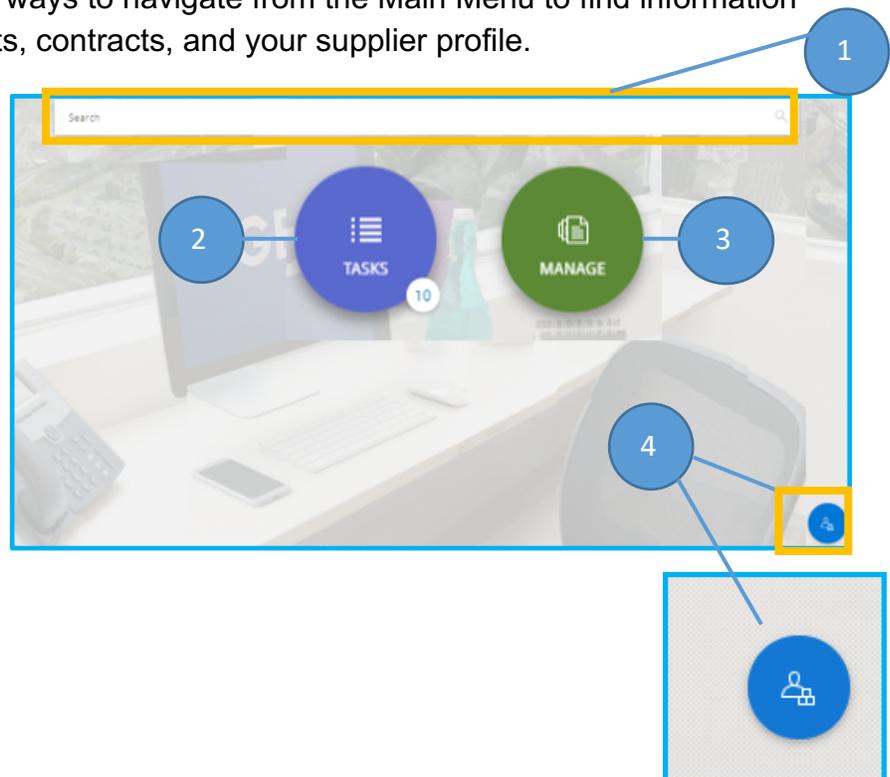
CalUsource expedites the process of bidding on RFX events from accepting bid guidelines, reviewing timelines, answering questions and providing price sheets.

Review this entire section to understand all aspects of responding to a CalUsource RFX event or go directly to the page for instructions with a specific CalUsource bidding task you need to perform.

### Navigating from the Main Menu

The CalUsource Main Menu is the starting point for accessing all CalUsource pages and features. There are four ways to navigate from the Main Menu to find information related to your bidding events, contracts, and your supplier profile.

1. Enter specific terms to search for an RFX or Contract name in the main **Search bar** and press enter to see a list that matches your search terms.
2. Click **Tasks** to see items awaiting action from you.
3. Click **Manage** to see all existing CalUsource RFX events available for viewing.
4. Click **Supplier Profile** to review and update your company's profile and contact information.

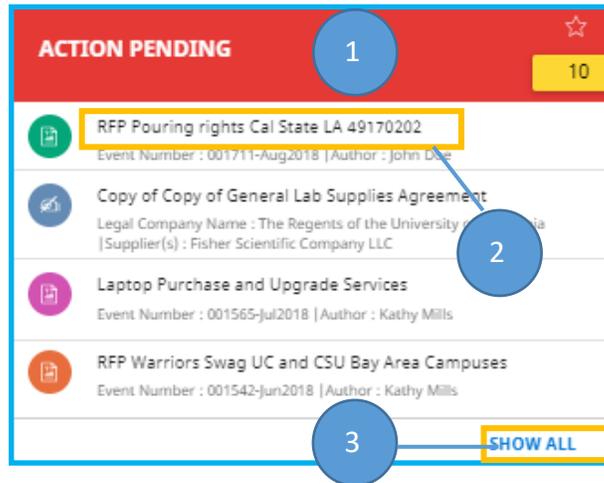


## Utilizing the Task and Manage Menus

### Task Menu/Action Pending Card

When you click the Task Menu, the Action Pending card displays documents associated with you. The most recently modified documents will display at the top.

1. In most cases, the only card that will appear in the Task Menu is **Action Pending**. This card will list all items that require action from you.
2. Click the document's name to open it.
3. Click **Show All** to display all your Action Pending records.

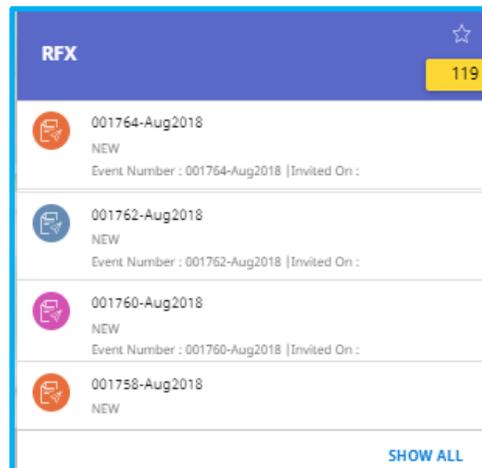
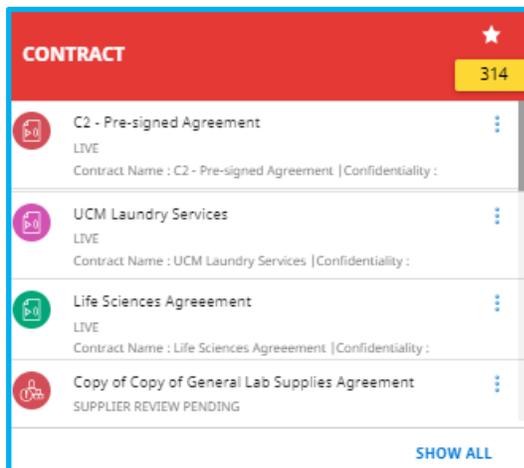


### Manage Menu

The Manage Menu lists all documents that you have access to, both those that are currently in progress and those that have been completed.

**Contract Card:** Lists contracts that you have been awarded.

**RFX Card:** Lists sourcing events you have responded to, or are in the process of responding to.



## Top Blue Bar Features

The top blue bar has numerous icons to access and navigate CalUsource features.



### Left Side Navigation Aids

**Back button:** Redisplays the previous screen.



**Home:** Returns you to the Main Menu from any CalUsource screen.



**Page Title:** The name and status of the displayed page.

TASK - ACTION PENDING

### Right Side Navigation Aids

**Profile:** Defines your account credentials, including password and electronic signature setup.



**Bookmarks:** Allows you to add bookmarks and select existing ones for quick access.



**Announcements:** Provides the latest CalUsource published announcements.



**Support:** Used to access the Help Center. For help with CalUsource issues contact [support@gep.com](mailto:support@gep.com).



**Navigation:** Used to display the Log Out button  and to provide quick access to CalUsource modules.



The following pages provide instructions on how to review and respond to a bid CalUsource.

## Event Details Section

As the first section of the RFx, the Basic Details section acts as a cover sheet, providing an overview of the event. Key fields are highlighted below:

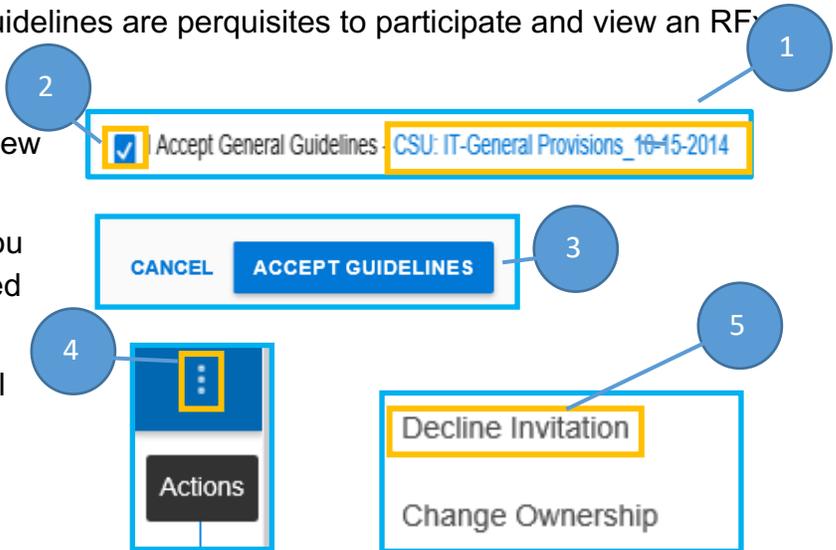
- **Event Name**
- **Event Description** – basic details of the event.
- **Event Type** – RFP, RFI, RFQ.
- **Event Overview**
- **Category** – The type of supplies/services addressed in the RFx.
- **Region** – Campus(es) covered by the RFx.

✓ BASIC DETAILS  
 Event Name  
 Laptop Purchase and Upgrade Services  
 Event Description  
 --  
 Event Type  
 Request for Proposal  
 Event Currency  
 USD  
 Event Overview  
 -  
 Category  
 IT/ TELECOM  
 Business Unit  
 Procurement  
 Region  
 UC Campuses

## Accepting Event Guidelines

You must read and accept all guidelines listed on the top of the page before you can participate in the RFx event. Guidelines are prerequisites to participate and view an RFx event.

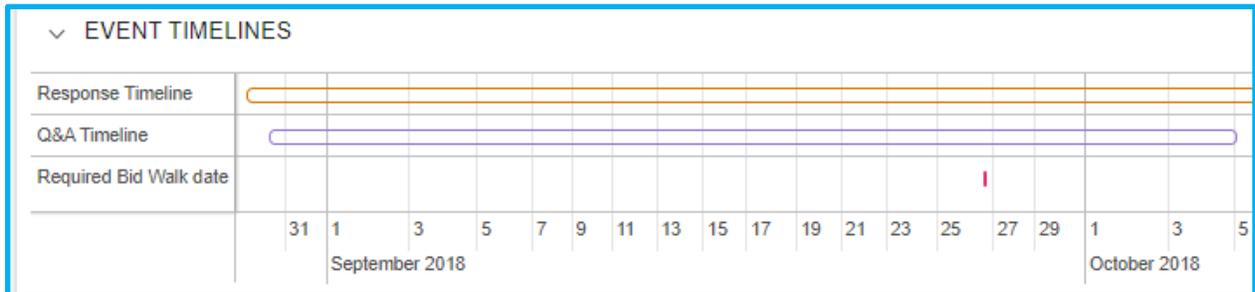
1. Click on the **hyperlink** to view event Guidelines.
2. **Check the box** to certify you have reviewed and accepted the Guidelines.
3. When you have checked all required guidelines, click **Accept Guidelines** in the lower right corner.
4. If you wish to decline participation in the event, click the **Actions icon**.
5. Select **Decline Invitation**.



## Event Timelines

The **Event Timelines** section provides a graphical representation of the time allotted for each phase of the event.

The **Response Timeline** is of critical importance to you. To be considered, your response must be submitted by the end date and time shown in the Response Timeline.



**Note:** The names of the timelines displayed in the graphic will vary from RFX to RFX.

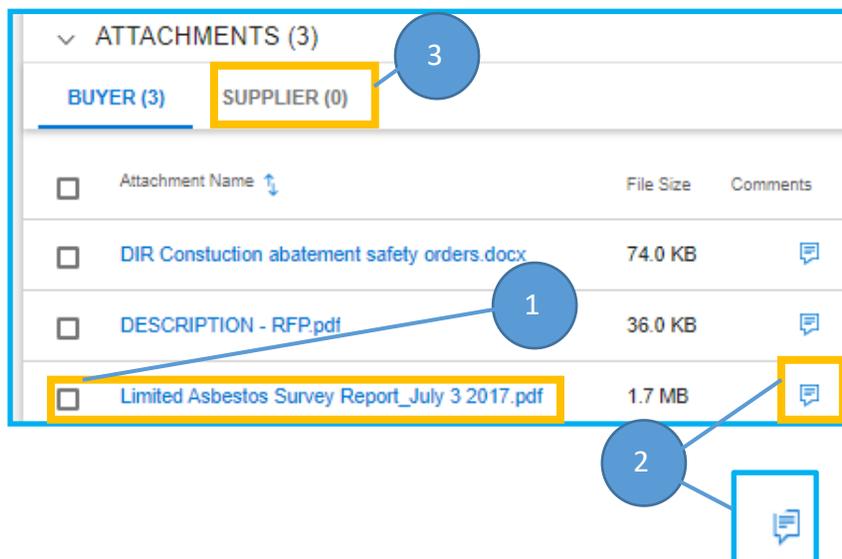
The time remaining before the response period is closed displays in the upper right of the top blue bar as shown below.



## Viewing and Adding Attachments

Use the Attachments section to view documents the RFX author has uploaded for your review.

1. Click documents to download them.
2. Click the **Comments icon** to view information the RFX author has provided about the attachment.
3. Click **Supplier** to upload documents that support your response.



**Note:** Do NOT load Questionnaire and Price Sheet responses in the Attachment section. Use the 'Questionnaire' and 'Price Sheet' sections to load your responses.

## Completing Price Sheets

A price sheet includes a list of items specified by the RFX author. Suppliers can provide quotes for all or some of these items. Also, you can choose to complete the price sheet online, or download the sheet to work offline and upload it upon completion.

1. Go to the **Price Sheets** section. Click on a **price sheet name** to open it.
2. The **Response Completion %** column displays the percentage of price sheet fields that have been already completed. Price sheets for which you have not provided quotes are listed as 0.00%.
3. Review the top fields of the price sheet to confirm which items require you to provide prices.
4. In the **Intend to Bid** column, select **Yes** for items on which you will bid, and **No** for items on which you will not bid.
5. Complete the **Price Per Unit** column for all items on which you are bidding.
6. **Alternately**, if you choose to work on the price sheet offline, click the **Download icon** in the upper right of the screen to download the sheet.
7. Once you have completed your price sheets offline, click the **Upload icon** to upload them back into CalUsource.

Price Sheet Name	Last Modified By	Last Modified On	Response Completion %
Bid Sheet	-	-	0.00%

Price Sheet Name	Bid Sheet
Price Sheet Type	Services
Price Sheet Description	All inclusive cost for services, permits and disposal of asbestos.

	*Intend to Bid	*Description
2	Yes	MRAK HALL
3	Yes	ARS-J1 Boiler.
4	Yes	ITEH-Boile
5	Yes	ITEH-Small B..

1	*Intend to Bid	*Description	Unit	*Price Per Uni..
2	Yes	MRAK HALL	1	
3	Yes	ARS-J1 Boiler.	1	



## Completing Questionnaires

An RFX may have one or more questionnaires. You must answer all questions in each questionnaire before you will be allowed to submit your bid response. Follow these instructions to respond to CalUsource questionnaires.

1. Click the **Questionnaire** name in the **Questionnaire** section to display the questionnaire.



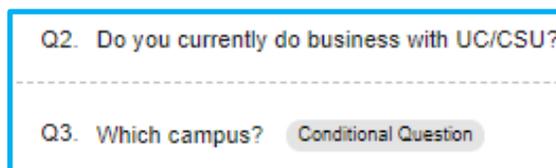
2. Answer the questions in CalUsource.

—OR—

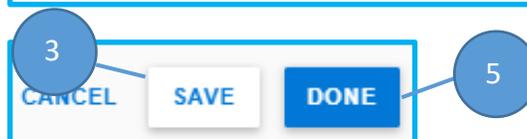
Click the **Download icon** to download the questionnaire. (If you download the questionnaire, insert your answers in the *Response to Question* column of the downloaded file and save the document.



3. If you answer questions in CalUsource, click **Save** periodically to ensure you don't lose your work.



4. Answer all questions. The **Response Completeness** indicator will help you keep track of your progress. When the indicator display 100%, you are finished.



5. Click **Done** when you have answered all questions.

6. If you have downloaded questionnaires and completed them offline, click the **Upload icon** to upload them back into CalUsource.

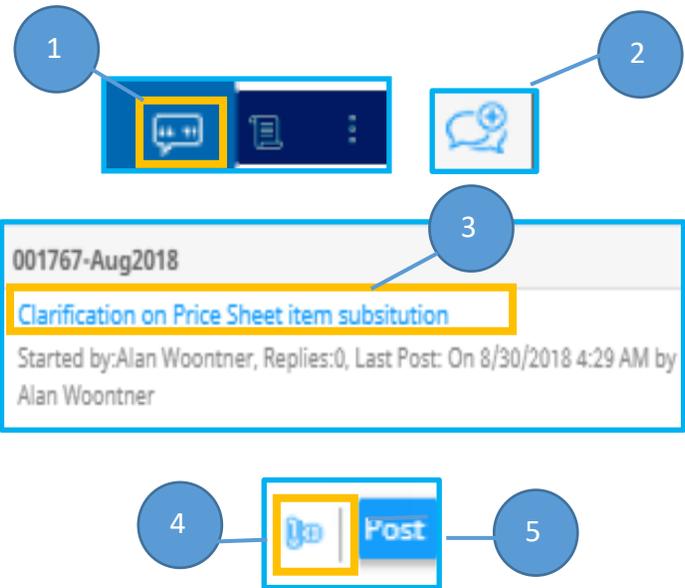


## Using the Discussion Forum

Use the RFX Discussion Forum to ask questions and reply to discussion topics.

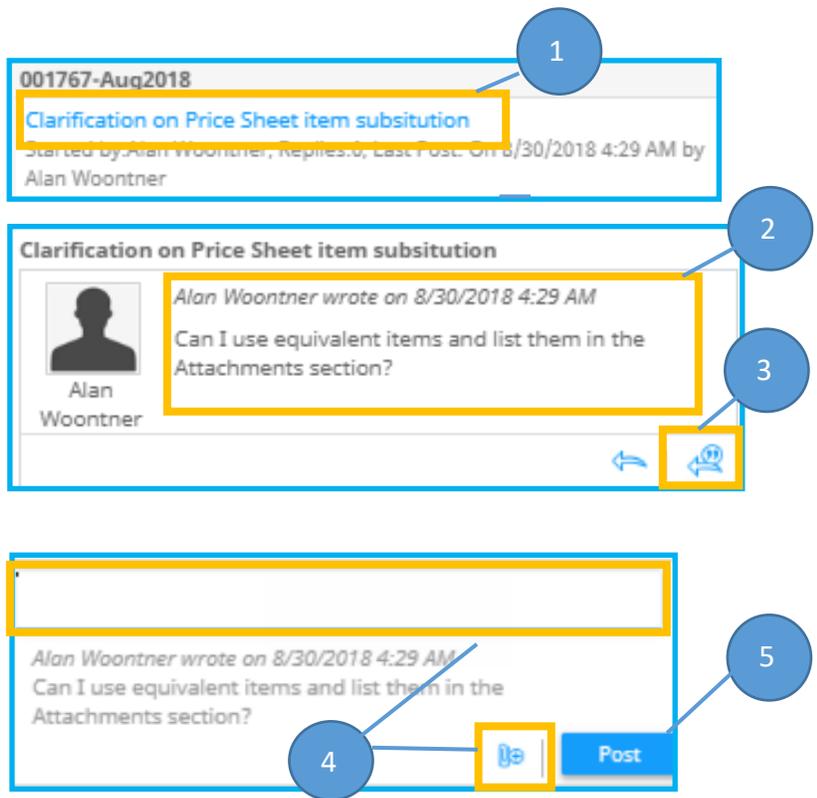
### Opening the Discussion Forum

1. Click the **Discussion Forum icon** in the top right corner of an RFX event screen to access the forum.
2. Click the **Add New Discussion icon** to start a discussion topic.
3. Add a descriptive **Discussion Title** and type your question below the title. Check the **Email Notifications** box to be notified on responses to your post.
4. Click the **Add Attachment icon** to upload related documents.
5. Click **Post** to post your discussion.



### Replying to a Group Discussion Topic

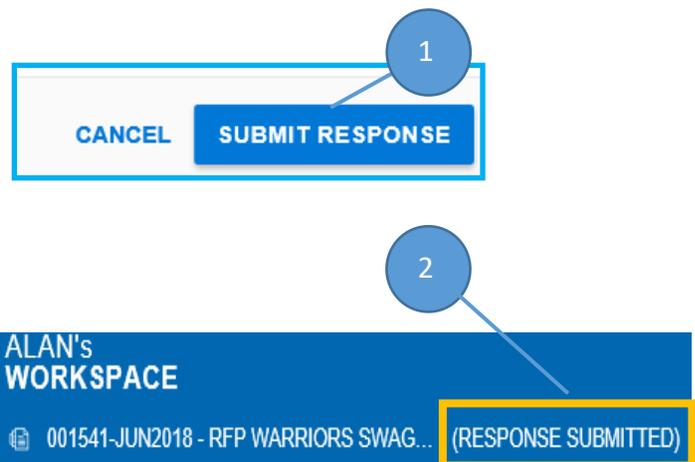
1. Discussion topic titles are listed in blue on the main Group Discussion page. Click a **title** to display the discussion topic in a popup.
2. The discussion topic text displays at the top of the popup.
3. Click the **Reply with Quote icon**. This copies the discussion text into your reply to provide context.
4. **Enter your reply** in the blank field in the middle of the popup. Add files to your reply by clicking the **Attachment icon**.
5. Click **Post**.



## Submitting your Response

After you have answered all RFX questions and completed the pricing sheets, you can submit your RFX response\*.

1. Click the **Submit Response** button in the lower right of your screen, and click **Yes** in the Confirmation message.
2. **Response Submitted** will display in the top blue bar, or an error message will display describing the additional information required.



**\*Note:** A primary respondent can reassign ownership to another contact (also registered in CalUsource) to submit the RFX.

## Bidding Checklist

Use the following checklist to complete your bid before submitting it:

- [Accept Guidelines](#)  
You must accept the RFX guidelines before bidding.
- [Review All RFX Details](#)  
Check the information you have entered in all RFX sections. Make sure you read all attachments before bidding.
- [Use the Discussion Forum](#)  
CalUsource hosts a Discussion Forum for each RFX so you can ask questions and see responses to questions that other suppliers have asked. Ask questions as early in the process as possible to allow the RFX author time to provide a complete answer.
- [Prepare a Price Sheet for All Items](#)  
You must indicate whether you intend to bid on each item listed in each price sheet. You must also enter a price per unit for all items on which you are bidding.
- [Prepare Questionnaire Responses](#)  
You must respond to all RFX Questionnaire questions before submitting your bid.

## Withdrawing and Resubmitting a Bid

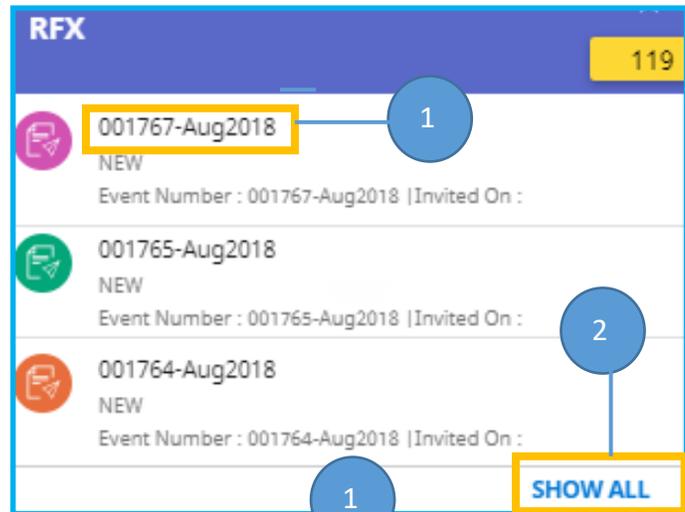
You can withdraw a submitted bid while the response period is open if:

- a) you want to make changes to your response or,
- b) you no longer want to be considered for an RFX.

### Locating a Submitted Bid

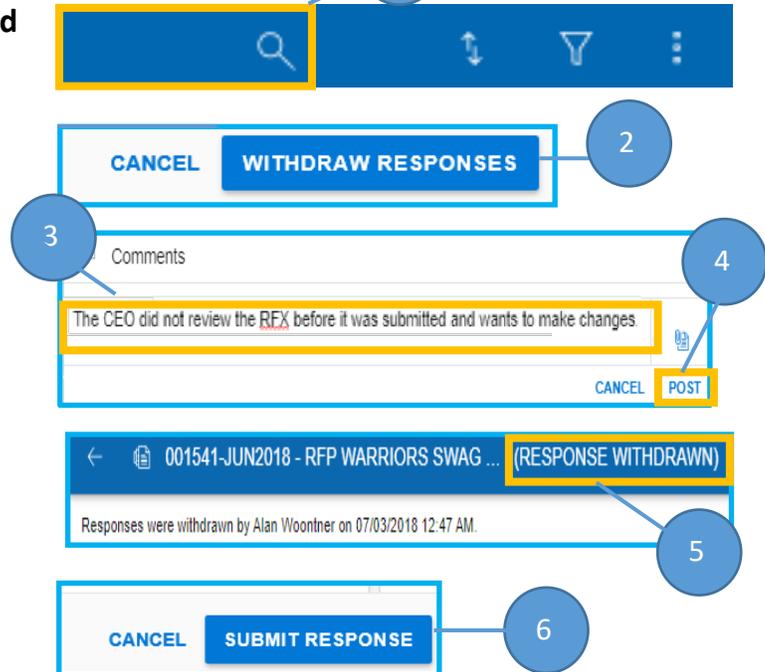
Submitted bids can be accessed by clicking **Manage** on the Main Menu.

1. If the RFX desired displays in the Card list, click the **RFX title** to open it.
2. If it does not display, click **Show All** at the bottom of the Card.
3. If the RFX list is too long, enter the name of the RFX in the **Search** field and press Enter. Click on the **RFX title** in the list to open it.



### Withdrawing and Resubmitting a Bid

1. With the RFX displayed, click the **Withdraw Responses** button in the lower right of your screen, then click **Yes** in the Confirmation message.
2. Enter a reason for withdrawing your response in the **Comments** popup that displays.
3. Click **Post**.
4. **Response Withdrawn** will display in the top blue bar.
5. Make the necessary changes to your RFX bid.
6. Click **Submit Responses** to resubmit your bid.



## CONTRACTING IN CALUSOURCE

CalUsource facilitates the contracting process by:

- Sharing contract details, such as party contact information, contract terms, compliance requirements, notification schedules, access to additional attachments and other pertinent information.
- Facilitates the process of contract language review, redlining and revisioning among all parties.
- Facilitates the process of contract execution.

### Contract Document Overview

The following table defines each section of a CalUsource contract document.

**Basic Details** – The contract cover sheet provides basic details about the contract.

**Applicable For** – Defines commodity category and campuses to which the contract pertains.

**Internal Party** – Lists authoring entity’s key contacts and parties.

**External Party** – Lists your company’s contract contact and signatory.

**Terms** – Lists the Parent Contract Number or Name (if applicable), contract value, payment terms, effective date, how long the contract remains in effect, and any renewal conditions.

**Contract Language** – For review and revision of contract language (see below).

**Notes and Attachments** – Displays contract-related files, notes and external links.

**Lines** – Displays lines from the RFX price sheet.

**Team Members** – Lists authoring entity’s contract viewers or reviewers.

**Notifications** – Lists notifications you will receive during the life of the contract.

> BASIC DETAILS
> APPLICABLE FOR
> INTERNAL PARTY
> EXTERNAL PARTY
> TERMS
> CONTRACT LANGUAGE - Pre-signed Mode
> NOTES AND ATTACHMENTS
> LINES
> TEAM MEMBERS
> NOTIFICATIONS
> ADDITIONAL INFORMATION

## Reviewing and Revising Contract Language

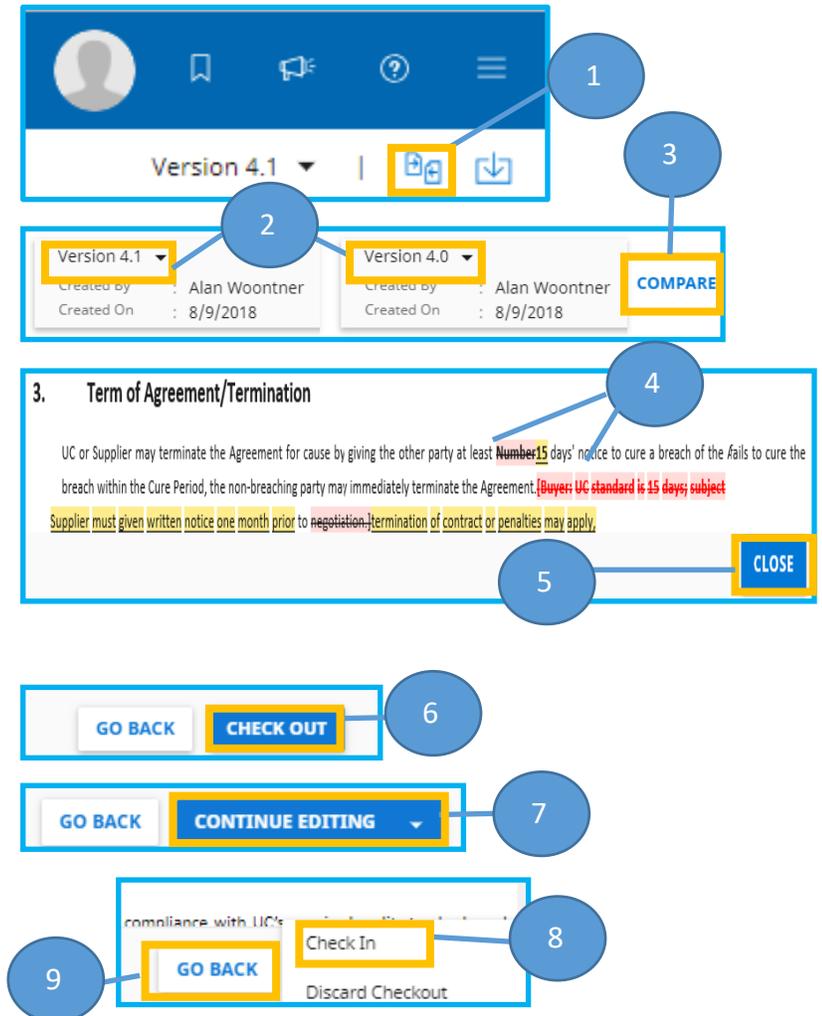
You will receive an email notification with a login link when your contract is ready for review. Upon review, you can accept the contract language as is or suggest modifications. This process is the equivalent of track change redlining.

1. Once logged in, click **Tasks** on the **Main Menu** and click on the **Contract's Name** in the Action Pending card to display it.
2. Click the down arrow to open the **Contract Language** section.
3. Click the **contract document's name** to review it.
4. Upon review, if you are satisfied with the contract language, click **Accept** (bottom of screen) to approve the contract. (Skip to "Accepting the Contract" – pg 25.)
5. If not satisfied, click **Check Out** in the bottom right corner of the displayed document.
6. Click **Continue Editing**.
7. You can either edit the document in CalUSource (similar to Microsoft Word) or click the **Download icon** and edit offline. Downloading will allow you to share the document with others to review and redline.
8. If you made changes to a downloaded document, click **Upload Minor Version** in the lower right corner to upload it.
9. Click **Check In** when you have finished making changes.
10. The new **Version Number** will display at the top of the screen.

## Comparing Versions of a Document

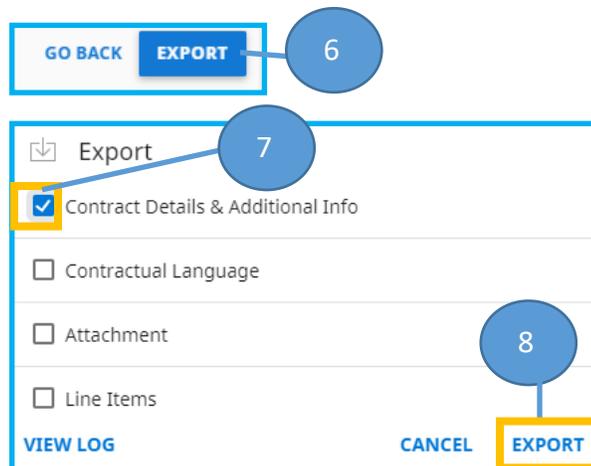
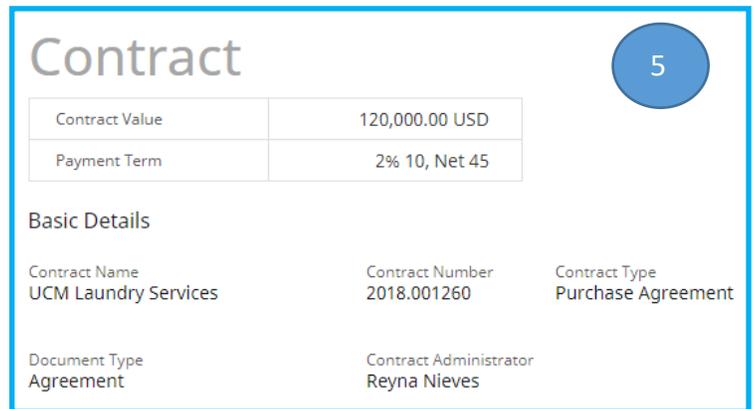
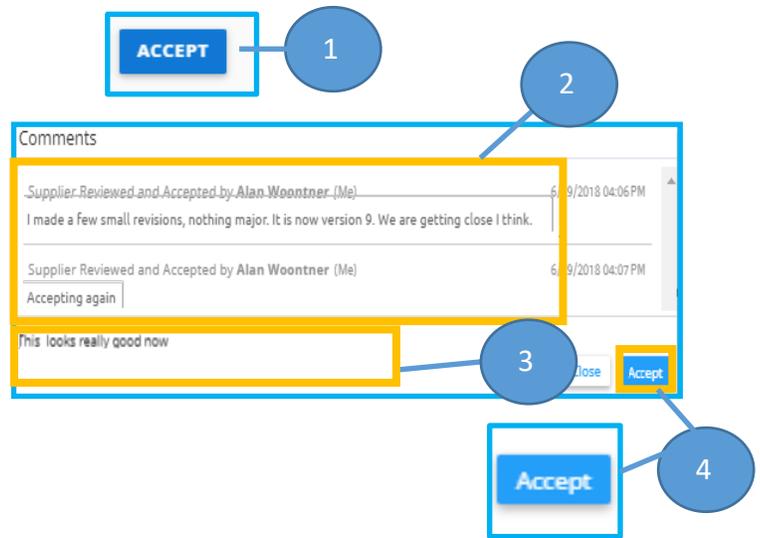
**Note:** Comparing versions is optional. If not comparing versions, go to “Accepting the Contract” on the next page.

1. Click the **Compare Versions icon** to compare what you have changed to previous versions.
2. Click the dropdown arrows in the left and right boxes to select the versions you want to compare.
3. Click **Compare** to see a markup comparing the two versions you selected.
4. In the compared document, yellow highlights denote text that has been added. Crossed-out text has been deleted.
5. Click **Close** to re-display the current version.
6. Click **Check Out**.
7. Click the down arrow next to **Continue Editing**.
8. Click **Check In**.
9. Click **Go Back** to return to the main contract document.



## Accepting the Contract

1. Click **Accept** in the main contract document to accept the Contract.
2. Review previous comments about the document in the top section of the Comments pop-up.
3. Add your comments indicating any changes you made or confirming your acceptance in the bottom part of the Comments popup.
4. Click **Accept**. This forwards the contract to the contract author who will review your changes and comments and determine next steps.
5. The contract cover sheet displays and a **Contract Successfully Added** appears at the bottom of the screen.
6. Click **Export** at the bottom of the screen if you want to export the contract to your computer.
7. Select the particular contract language document(s) you want to export.
8. Click **Export** again.

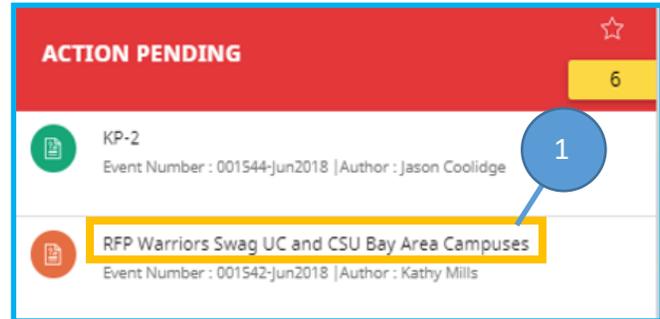


## Executing the Contract

Once the contract has been accepted by both parties, you will receive an email notification to sign the contract.

1. Click **Tasks** in the **Main Menu**.  
Click the contract title in the **Action Pending** card to open the contract.
2. Click **Sign Contract** at the bottom of the page.
3. Enter your password in the **Signatory Password** field.
4. Click the check mark stating you have authority to sign the contract.
5. Click **Sign**.
6. **Supplier Signed** displays in the top blue bar. Your signed contract is forwarded to the internal signatory. The contract is executed once they sign it.

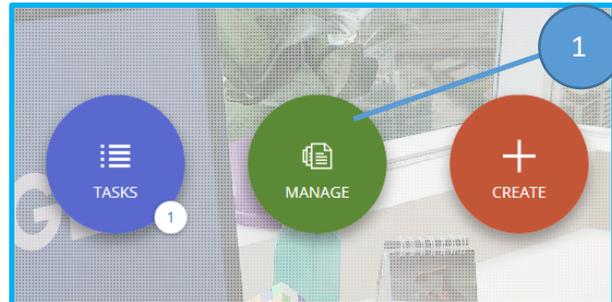
You will receive an email notification when your contract has been executed and is designated as “Live” in CalUsource.



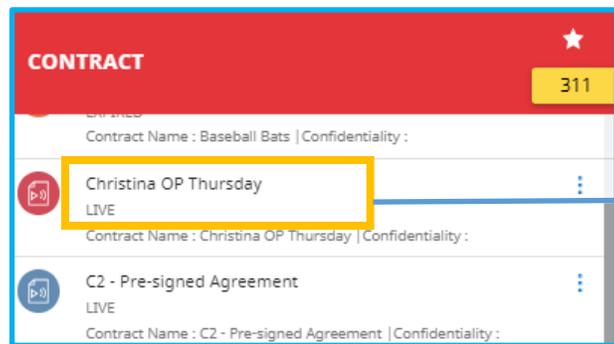
## Accessing a Live Contract

You can access live agreements in CalUsource to track any revisions and modifications that occur throughout its life.

1. Log in to CalUsource and click **Manage** in the **Main Menu**.
2. Locate the contract in the **Contract** card. If a contract is live, **LIVE** will display under the contract's name.

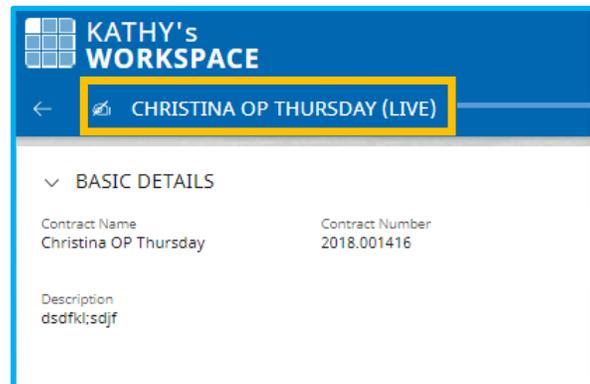


You may need to click **Show All** (at the bottom of the card) if you have several contracts listed.

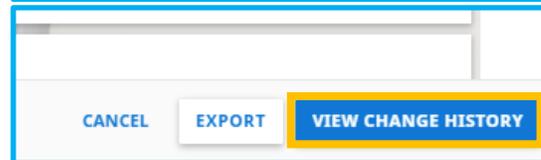


Click the **Contract name** to display the contract.

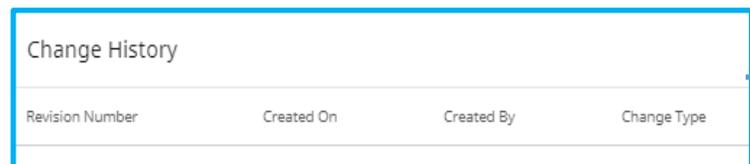
3. The contract document displays and **Live** displays in the top blue bar.



4. Click the **View Change History** button.



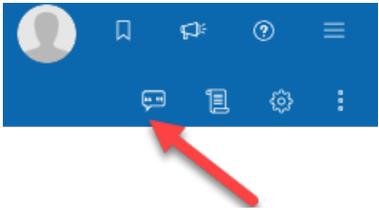
5. Review any contract revisions that have occurred since the contract has gone live in the **Change History** popup.



## GETTING HELP

The type of issue you are experiencing determines where you should go for help.

The table below identifies the appropriate CalUsource resource to contact for help with technical issues, registration, bidding, and contracts.

<p>For technical issues or general information on using CalUsource</p>	<p>Contact the GEP* Help Desk at <a href="mailto:support@gep.com">support@gep.com</a>. *GEP is the technology provider of the CalUsource platform.</p>
<p>For general questions related to an RFx event posted on the CalUsource Public Bid Site</p>	<p>Refer to Contact name and email listed directly below the RFx title in the listing on the Public Bid Site.</p> <div data-bbox="641 745 1274 840" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  <span>UCR RFP 05_1120_0017P - UC Systemwide Contact : Alan Stauffer   Email : <a href="mailto:Alan.Stauffer@UCR.edu">Alan.Stauffer@UCR.edu</a></span> </div>
<p>For questions or assistance related to an active RFx event on which you are currently bidding</p>	<p>Open the RFx in CalUsource and click on the Discussion Forum icon (shown below) to submit a question within the Q&amp;A time period specified in the RFx. The question you submitted will be answered according to the Q&amp;A time period through the Discussion Forum (see p.19 for more detail).</p> <div data-bbox="636 1249 1015 1459" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>
<p>For questions about contract terms, conditions or contract language.</p>	<p>Open the Contract in CalUsource, and scroll down to the <b>Internal Party</b> section which lists the authoring entity's key contacts and parties.</p>

## CalUsource Sites and Resources

Click the following URLs to access CalUsource resources for Suppliers.

<a href="#">CalUsource Public Bid Site</a>	<p>Lists all active and closed bidding events within CalUsource.</p> <p>Provides a link to self-register in CalUsource.</p>
<a href="#">CalUsource Website</a>	<p>Resource for Suppliers interested in working with the University of California institutions.</p> <p>The CalUsource Public Bid Site is accessible from this website.</p>
<a href="#">CalUsource login</a>	<p>Allows registered CalUsource users to login to the CalUsource platform to participate in sourcing events.</p>

### Frequently Asked Questions

[Do I have to pay a membership fee to participate?](#)

There are no fees. The buying organization assumes all costs associated with running the RFX.

[How do I get a username and password?](#)

The email message inviting you to register for CalUsource and/or participate in the RFX contains your username and password.

[How do I change my password?](#)

You can change your password by clicking on the Profile icon (silhouette) that displays at the top of all CalUsource webpages. See Page 5 of this guide for more details.

[How do I change my time zone?](#)

You can change your time zone by clicking on the Profile icon (silhouette) that displays at the top of all CalUsource webpages. See Page 5 of this guide for more details.

[Do I have to fill out all the registration profile information?](#)

Only fields with a red asterisk (\*) are required. However, the buying organization will use the information in your profile to find suppliers for future sourcing events, so it is advantageous for you to complete your entire profile.

### Can my company bid as a team?

You can bid as a team only if the team members share a single login during the bid response process. Using the same login, different team members can edit, enter and save information, but the primary contact listed is the person who must submit the final bid.

Please note that only one team member should edit the bid at a time. Otherwise, one team member can overwrite another team member. You can change ownership of a bid by selecting **Ownership** on the **Actions menu** and changing the role of Primary Respondent to another registered CalUsource user in your company.

### What do I do if I make a mistake?

CalUsource checks your bid when you submit it and informs you of any errors that need correction. CalUsource will display a 'Success' message if your bid has been submitted properly.

### Can I change my bid after it is submitted?

You can withdraw and resubmit your bid only while the RFX is in the Response phase.

### How do I send a message to the buying organization?

Click the Discussion Forum icon in the RFX, and then click the add New Discussion icon. Enter your message, and click Post.

### Will other suppliers be able to see my bid or name?

No, other suppliers will not be able to see your bid.

### Will the event end automatically?

The event will close automatically at the end date/time shown in the RFX timeline.

### Do I need to save the information I enter during bidding?

CalUsource automatically saves information that you enter into each section. However, we do recommend saving your questionnaire responses as you enter them, as it is possible to inadvertently cancel out and lose your responses.