



Creating an RFx, Part II

Price Sheets and Questionnaires Deep Dive

Webinar Wednesday Training Series

Agenda

- Learning Objectives
- Creating/Managing Questionnaires
- Creating/Managing Price Sheets
- Resources
- Q & A

Learning Objectives

- Understand how to create and edit a price sheet/questionnaire from scratch and via our repository
- Learn how to manage price sheets/questionnaires for evaluation purposes
- Learn how to access existing resources

Creating and Managing Price Sheets

Accessing CalUsource

1. Navigate to procurement.ucop.edu
2. Select Resources -> Platforms -> CalUsource
3. Select Access CalUsource -> I work for the UC
4. Log in using your Campus SSO

CalUsource Login

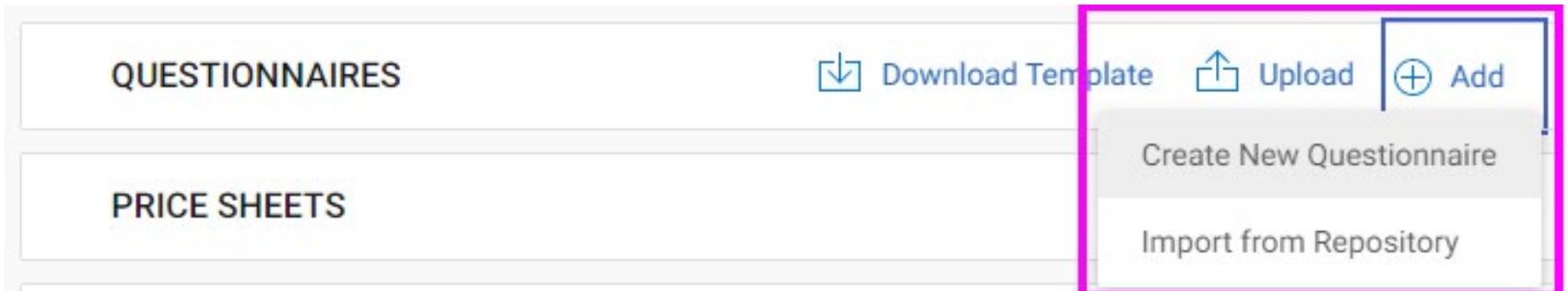
Please choose your role

I work for the UC
All UC staff should use this link to access CalUsource

I am a UC Supplier
This link is for suppliers who have completed the registration process

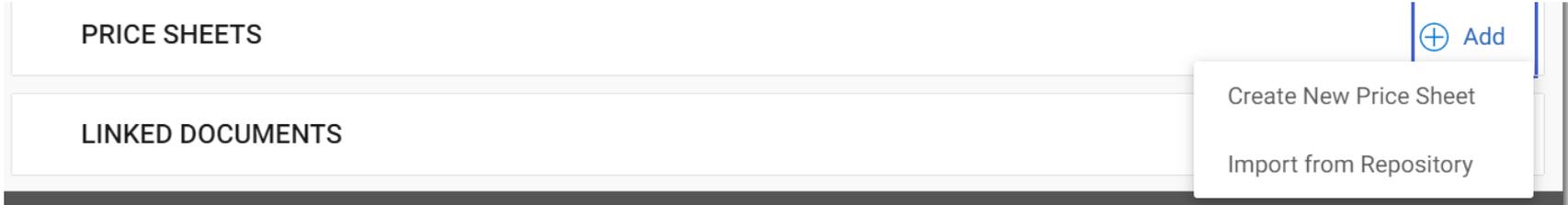
I want to become a UC Supplier
Use this link if have not registered to become a UC supplier

Creating a Questionnaire



- Questionnaires can be created from scratch or imported from our repository
- Then, create questions for your questionnaire to fit your sourcing event
 - Optionally, you can add conditional questions if applicable
- You can also download a questionnaire, edit in Excel and then upload the questionnaire to your event
- Lastly, assign weights to your questionnaire(s) for evaluation purposes
- You can also assign specific team members evaluation duties for specific questionnaires

Creating a Price Sheet



- Price Sheets can be created from scratch or imported from our repository
- Then, customize the price sheet columns to fit your sourcing event
- You can also download a price sheet, edit in Excel and then upload the price sheet to your event
- Lastly, assign weights to your price sheet rows for evaluation purposes
- You can also assign specific team members evaluation duties for specific price sheets

Resources

Sourcing Quick Reference Guides

[Creating a Price Sheet](#)

[Creating a Price Sheet from the Repository](#)

[Customizing Price Sheet Columns](#)

[Uploading a Price Sheet](#)

[Downloading a Price Sheet](#)

[Creating a Questionnaire](#)

[Creating Questions for Your Questionnaire](#)

[Creating Conditional Questionnaire Questions](#)

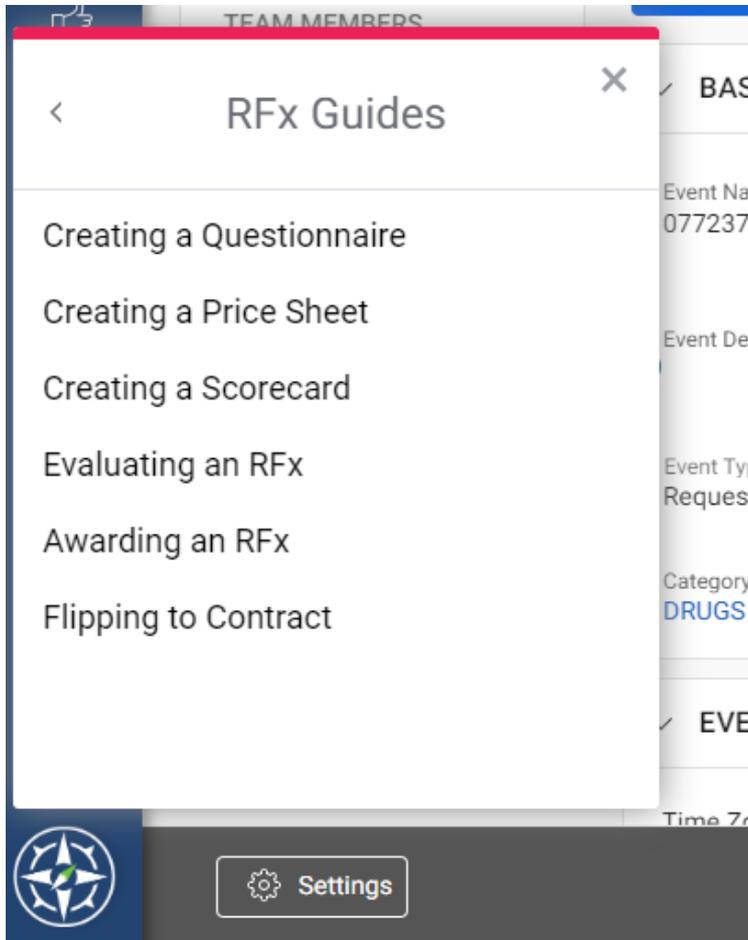
[Uploading a Questionnaire](#)

[Downloading a Questionnaire](#)

[Assigning Weights to Questions](#)

[Exporting a Questionnaire for Editing Purposes](#)

Need Additional Assistance?



- Try CalUsource Navigator!
- Attend our bi-weekly office hours, every other Wednesday
- Email us!
support@ucprocure.zendesk.com

Questions?

