

Persona FAQ

A persona is a pre-defined role that grants an individual the ability to perform various tasks in CalUsource. The persona defines what information can be seen and the actions taken. Only one persona can be assigned to each individual.

CalUsource Persona Definitions and Abilities

Persona	Description
Campus Viewer (default persona)	<p>Definition: This persona is assigned to non-procurement professionals giving them visibility to all contracts and any sourcing events where they have been added as a Team Member.</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Contracts, Sourcing (limited) • Default persona for non-procurement employees
Procurement Viewer (default persona)	<p>Definition: This persona is assigned to procurement professionals giving them visibility to all sourcing events and contracts, as well as access to the list of suppliers</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Contracts, Sourcing, and Suppliers • Default persona for all procurement employees
Sourcing & Contract Owner	<p>Definition: This persona is assigned to procurement professionals who author contracts or run sourcing events.</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Contracts, Sourcing, Suppliers, and Spend • Author/Edit/Amend: Contracts and Sourcing events • Sign: Contracts <p>Note: Amend and Edit abilities restricted to documents you author or are assigned to as a co-author</p>

Persona	Description
Sourcing & Contract Template Owner	<p>Definition: Persona assigned to 1-2 campus procurement professionals managing campus-specific contract language templates or sourcing templates</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Contracts, Sourcing, Suppliers, and Spend • Author/Edit/Amend: Contracts and Sourcing events • Sign: Contracts • Manage: Sourcing Templates and Contracts Language Templates <p>Note: Amend and Edit abilities restricted to documents you author or are assigned to as a co-author</p>
Contract Signatory	<p>Definition: Persona for professionals at a campus that sign, but do not author, contracts</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Sourcing, Contracts, and Suppliers • Sign: Contracts
External Panelist	<p>Definition: Persona for individuals outside the UC/CSU system who are invited to be evaluators on sourcing events</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Sourcing events they have been assigned to as an evaluator • Edit: Assign scores to supplier responses
Spend Analyst	<p>Definition: This persona is assigned to procurement professionals who create and publish spend reports.</p> <p>Abilities:</p> <ul style="list-style-type: none"> • View: Spend, Sourcing, Contracts, and Suppliers • Author/Edit/Amend: Spend reports

Personas authorized for Key Contracts Activity

Here is a quick table to define how personas apply to the Contracts module.

Key Activity	Applicable Persona(s)
Contract Creation	<ul style="list-style-type: none"> • Sourcing & Contract Owner • Sourcing & Contract Template Owner
Contract Signature	<ul style="list-style-type: none"> • Contract Signatory • Sourcing & Contract Owner • Sourcing & Contract Template Owner
Team Member (Internal) Review of Contract	ALL Personas
Manage Contract Language SMART Templates	<ul style="list-style-type: none"> • Sourcing & Contract Template Owner

Personas authorized for Key Sourcing Activity

Here is a quick table to define how personas apply to the Sourcing module.

Key Activity	Applicable Persona(s)
Event Creation	<ul style="list-style-type: none"> • Sourcing & Contract Owner • Sourcing & Contract Template Owner
Team Member – Coauthor	ALL Personas
Team Member – Evaluator	ALL Personas
Manage Questionnaires and Price File templates	<ul style="list-style-type: none"> • Sourcing & Contract Template Owner

Personas authorized for Key Spend Activity

Here is a quick table to define how personas apply to the Spend module.

Key Activity	Applicable Persona(s)
Report Creation and Publication	<ul style="list-style-type: none">• Spend Analyst• Sourcing & Contract Owner• Sourcing & Contract Template Owner