Overview

Sponsored by Administrative Application Development Initiative

Agenda

- **What is PrePurchasing?**
- **Current Usage**
- **Plans**
- **Getting Access / Getting Started**
- **Workgroups**
- **Workflow**
- **Feedback / Support**
- **Mailing Lists**
- **Demo**
- **Q&A**

What is PrePurchasing?

- **Flexible pre-purchasing process**
- **Aids in departmental approval aprocess**
- **Not meant to replace official approvals**

- **DaFIS integration**
  - **Creates saved document from PrePurchasing Request**

- **PrePurchasing Website**
http://ucdavis.github.com/Purchasing/index.html

Current Usage

- **Online in beta since April 2012**
- **1500+ Order Requests Processed**
- **15 Departments/Organizations**
  - **Both Academic and Administrative**
- **138 suggestions (from users) implemented**

- **Currently hosted by CA&ES Dean's Office**

Plans

- **Migrating and expanding to the cloud**

- **Making necessary changes to move to Microsoft Azure cloud hosting**
  - **Built-in redundancy**
  - **Dynamically expands to meet demand**

Getting Access / Getting Started

- **Submit request at http://prepurchasing.ucdavis.edu/DepartmentalAdmin Request/Create**

- **Admins are by department**

- **Admins setup permissions for their department(s)**
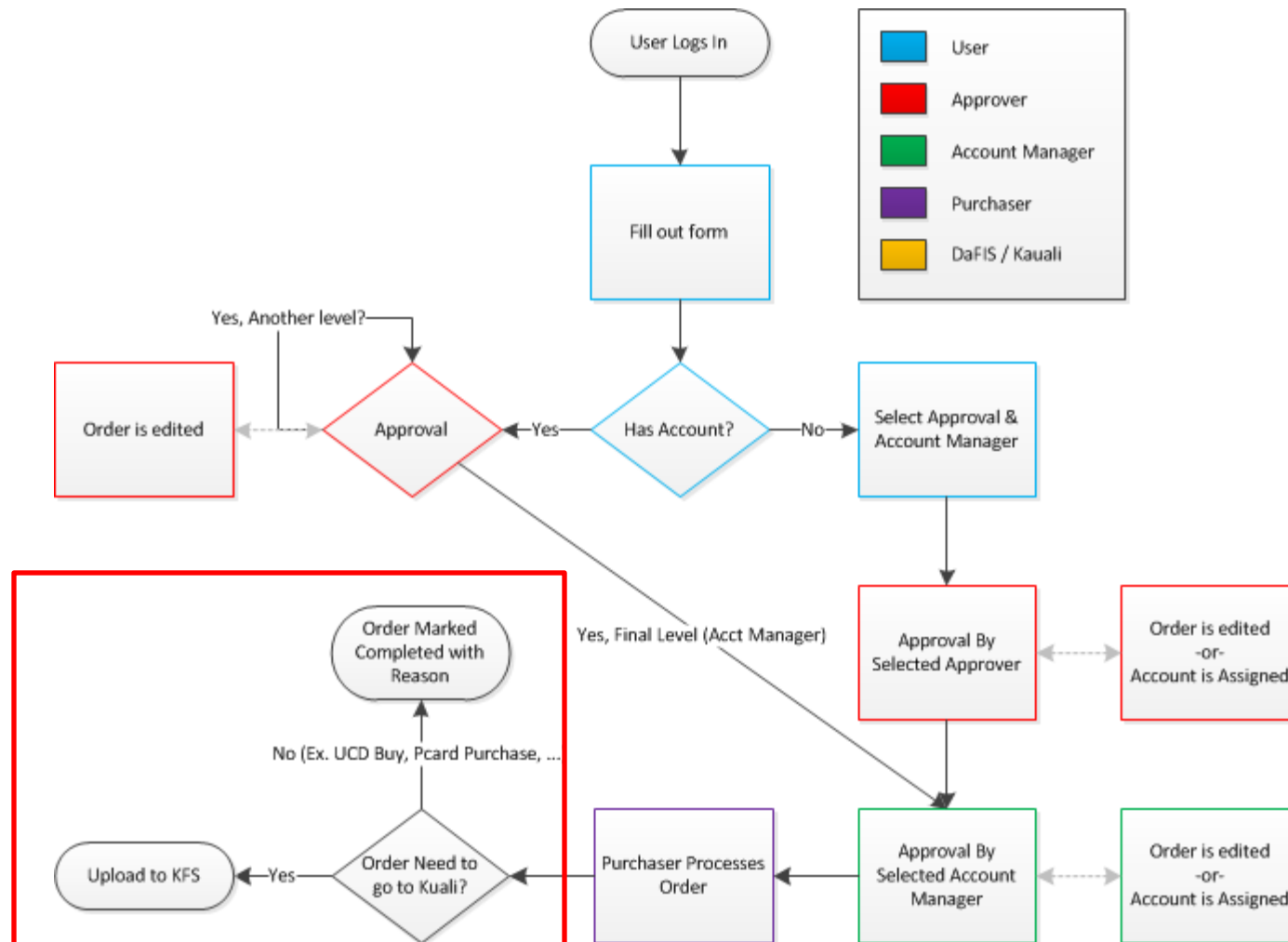
- **Training classes will be available**

Workgroups

- **A way to organize your departments**
- **Contains:**
  - **Users (in various roles)**
  - **Vendors**
  - **Accounts**
  - **Orders**
- **Associated with DaFIS orgs**

Workgroups (contd.)

- ## Options:
  - ### Administrative
  - ### Full Featured
  - ### Synchronize Accounts
  - ### Force account select at Approver
  - ### Show Controlled Substances Fields
- ## Organizations
  - ### Primary
  - ### Sub-Organizations

* **https://ucdavis.uservoice.com/knowledgebase/articles/95167-what-do-all-these-workgroup-options-mean-**

Order Request Workflow

Feedback and Support

- ## Check the FAQ:
  - **Before submitting a help desk ticket**
  - **https://ucdavis.uservoice.com/forums/126891-purchasing**

- ## Problems:
  - **Issues not resolved with the FAQ**
  - **Help Desk Ticketing**

- ## Suggestions:
  - **Ideas for improving the system**

Mailing Lists

- **All departmental admins:**
  - Opp-admins@ucdavis.edu
  - Subject starts with : [opp-admins]
- **All users including departmental admins:**
  - Opp-users@ucdavis.edu
  - Subject starts with : [opp-users]

- **Major Notifications**
  - Don't worry we won't spam you

Questions?

Demo time!