Overview

CA&ES Dean's Office, Computing Resources Unit

Agenda

- **Getting Access**
- **Workgroups**
- **Workflow**
- **Feedback / Support**
- **Mailing Lists**
- **Demo**

Getting Access

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

- **Admins are by department**
- **Admins setup permissions for their department(s)**

Workgroups

- **A way to organize your departments**
- **Contains:**
  - **Users (in various roles)**
  - **Vendors**
  - **Accounts**
  - **Orders**
- **Associated with one primary organization**
  - **And related "sub-orgs"**

- **Tool to help with deciding workgroups**
  - http://ucdavis.github.com/Purchasing/workgrouptool.html

Workgroups (contd.)

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

* http://ucdavis.github.com/Purchasing/faq.html#workgroupoptions

Order Request Workflow
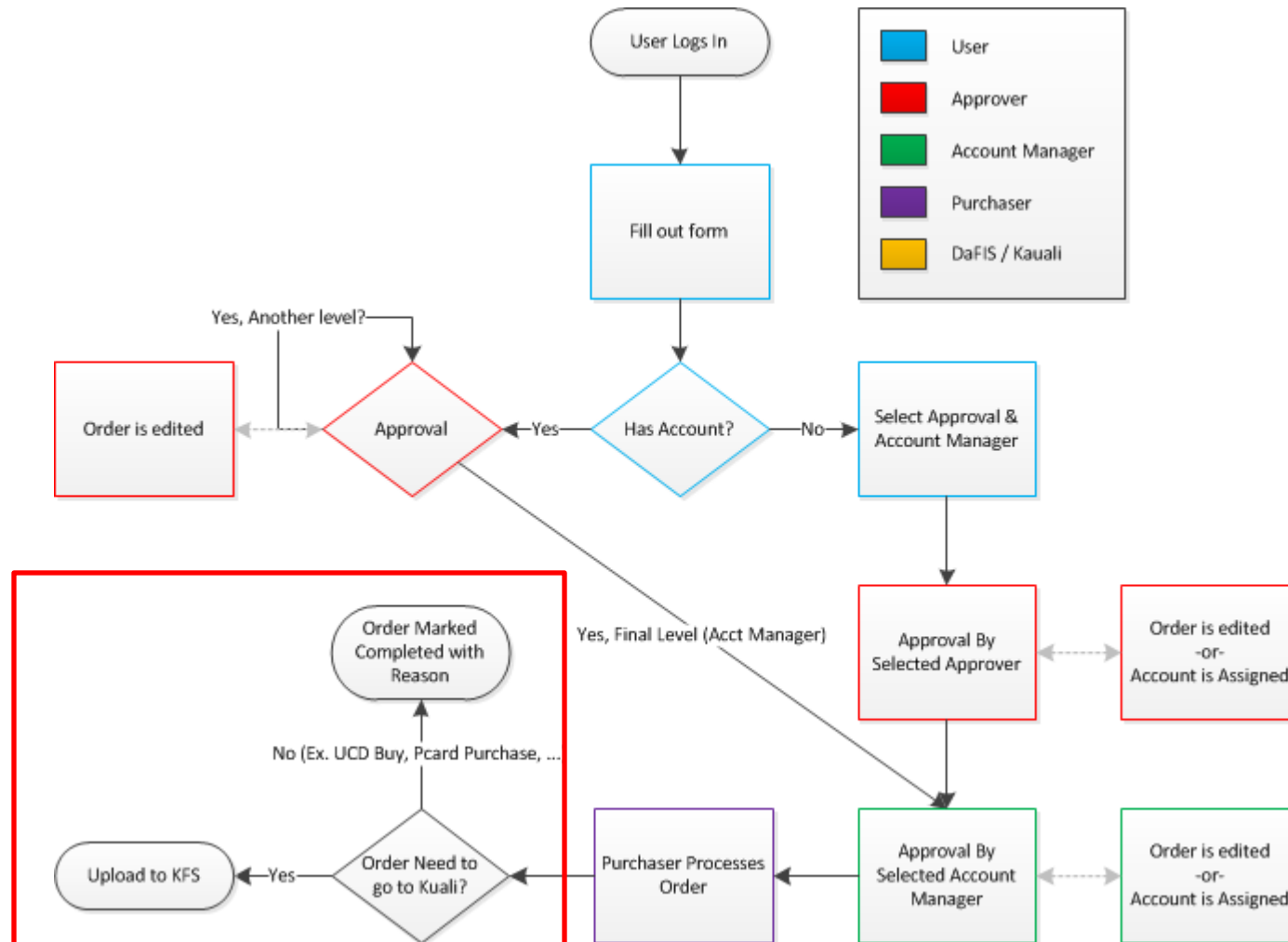
Feedback and Support

- ## 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]**

- **Used for notifications**
  - **System upgrades / downtimes**
  - **Reminder of resources like FAQ's or changes to procedures**

Questions?

Demo time!