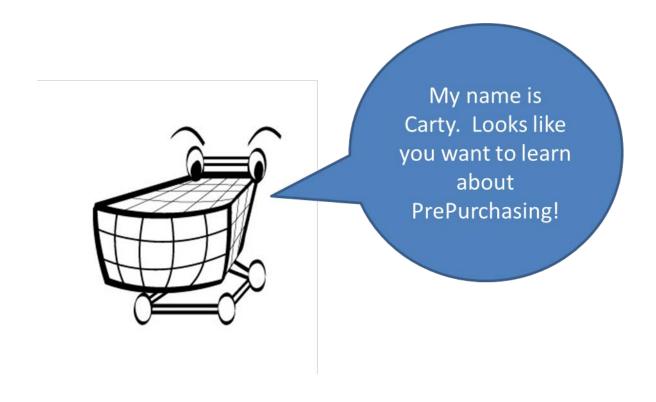


Overview



CA&ES Dean's Office, Computing Resources Unit



Instructors

- Jason Sylvestre
- Alan Lai



Agenda

- Permissions
- Workgroups
- Organizations
- Feedback / Support
- Mailing Lists
- Demo



Permissions

- Departmental Admin
 - Granted access to Organizations and Sub Organizations
 - Maintain Workgroups
 - Maintain some Organization level settings
- For a workgroup
 - You, as a departmental admin grant these permissions.
 - Requester
 - Approver
 - Account Manager
 - Purchaser
 - Reviewer



Workgroups

- What is a workgroup?
 - A way of organizing permissions, orders, and settings
 - Has a primary organization
 - Contains users with various permissions
 - Default
 - Vendors
 - Accounts (May sync with DaFIS)
 - Shipping Addresses
 - May have conditional approvals
 - 3 Types of workgroups
 - Normal
 - Administrative
 - Full Featured Administrative



Workgroups Cont.

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

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



Organizations

- We grant you access to Organizations, and the related sub organizations
- When we grant Departmental Admin access we will notify existing DA's that may be effected (Parent and Child Orgs)
- May have Organization Level Conditional Approvals
- May have custom fields
- Grants access to workgroups



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?

