Overview

My name is Carty. Looks like you want to learn about PrePurchasing!

CA&ES Dean's Office, Computing Resources Unit

Instructors

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- **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?