

## OCP Finance and Operations Workgroup

### Meeting Notes

November 1, 2021 10:30 a.m.

- [Purchase Agreements Overview](#) (Jen Thompson)
  - Presentation provided by Supply Chain Management
  - Great overview of Procurement
- KFS default home department code information updates (Kristine South)
  - Edit home department address
  - Email [OCPBusiness@ucdavis.edu](mailto:OCPBusiness@ucdavis.edu) if you have updates to make.
- Review Roles (Jen Thompson) – OCP BTS is currently reviewing roles and making updates as needed.
  - Online PrePurchasing
  - AggieBuy
  - KFS Users & Approval Delegates
  - AggieTravel delegates
- Other news from MAG:
  - Activate Travel cards – cards will automatically cancel if not activated.
  - DS reports not working for imported expenses – only way to remedy at the moment is to look inside each cardholders AggieTravel profile. Please check on all cardholders to be certain expenses are being reconciled in a timely manner.
  - Commonly used agreements – OCP BTS is compiling a list of all OCP agreements, etc. Info will be shared as it becomes available. The goal is to get commonly used agreements set up for all of OCP instead of each department doing their own.
- Walk-on Topics
  - List of admin resources – Let's be Subject Matter Experts for one another! If you know a particular software, policy, procedure, best practice, etc., let's share with one another!

## Offices of the Chancellor and Provost – Business & Technology Services

### Reminders

- VRA correspondence goes to [OCPVRA@ucdavis.edu](mailto:OCPVRA@ucdavis.edu)
- Access requests and correspondence goes to [MrakAccess@ucdavis.edu](mailto:MrakAccess@ucdavis.edu)
- [Small Business First](#)
  - Summarized on <https://myocp.ucdavis.edu/busops/procure>