**Administrative Managers Group (ADMAN)**

Meeting Minutes

**February 15, 2024 (Zoom)**

**3:00 – 5:00 pm**

**Adman Conference** –

* This year we moved to the Pavilion to accommodate 100+ more people, however breakouts were challenging in the new space.
* Catering is confirmed.
* Registration is open to all. Fees did increase this year. Scholarships available for up to 10 people and will be open until March 13. For those interested in the scholarship, please ensure they register for the conference first.
* Agenda is on the conference website. Trying some new activities, including networking bingo. There will be no afternoon breakout. There will be a panel of campus leaders who have created an inclusive environment for the staff. There will be tables for Lean Six Sigma and Staff Development.
* Alex Sheen is the keynote speaker and will be presenting in the morning. Meet and greet with keynote and a table to purchase books etc.. from the keynote speaker.
* We are still in need of donations! Need donations for AMP too!
* Volunteers needed for day of conference. March 27th! 7:45 start – breakfast
* Lisa Harry
* Annemarie Seed
* Vartan Vartkessian
* Trina Giardino (already registered, can she transfer her ticket to someone on her team?)
* Shannon Tanguay

**Welcome new ADMAN members!**

*Trina Giardino*

*Sheri L Kuslak-Meyer*

*Dan Ransom*

Reminder to all – we love to have engagement from everyone. We appreciate you asking good questions and volunteering to help in any capacity. Please consider applying for executive committee positions or volunteering to help with the ADMAN Conference. We are open to suggestions and ideas to discuss issues that you are facing in your job. This is always a safe space to discuss and get support from your peers.

**AggieEnterprise General:**

* The support and office hours will begin ramping down soon.
* Ignore PPM and focus on incorrect mapping of GL. Focus on using the spreadsheet campus gave us.
* CGA – starting to see some movement on the tickets. Asking for extension on projects that are due a close out.
* Recharges are starting to move and picking up the pace too.
* Putting together a charge letter, to consolidate shared issues.
* Campus 2/21 will disband the Executive Advisory Committee

**Demos and tips using AE:**

* Finjector - https://finjector.ucdavis.edu (COA picker)
  + Hot Tip - Create chart strings and save them in folders for your admin team
  + Create folders for each Center/Project – share feature, to give full chart string and pick and pull pieces needed for UCPath
* Segmentor - <https://segmentor.ucdavis.edu/>
* Transaction Listing Report – best report to use to validate data that mapped over
  + Put in department info and date back to July 2023
    - Campus mapped monthly leading up to the conversion, so they can pull fiscal reporting for the Office of the President
* Self supporting activities – Look at natural accounts
* Transferring PPM Project Costs <https://caes.ucdavis.edu/admin/financial/fsg>
* There is a short video on how to pull the UCD Transaction Listing that I showed at the bottom of the KBA  <https://kb.ucdavis.edu/?id=09757>
* Catalog suppliers:<https://aggieenterprise.ucdavis.edu/supply-chain/catalog-suppliers>
* Review Project Performance link is helpful

**Shared suggestions:**

* Would like videos and in person trainings for project portfolio.
* Demos running common reports
* KBAs helpful, but not being kept up to date – working on updates to help navigate the changes, using color coding and search feature to make sure you are pulling most recent.
* Separation of duties – KBA
* Suggest that James Ringo present next month