

Administrative Managers Group (ADMAN)

Meeting Minutes

(Recording available)

October 19, 2023

3:00 – 5:00 pm

3:00pm

AggieEnterprise (session was recorded)

Cutover – Important dates

- Cutover Resources – Freeze Date and Guidance Document available – living document with fluid dates and guidance changing as we update.
- Subscribe to Knowledge Base articles for updates!
 - Get emails when updates happen with link to change log.
- Google Calendar is available at bottom of every AggieEnterprise page. Organized by work stream. Use Agenda or Month option for custom views.

Training

- <https://aggieenterprise.sf.ucdavis.edu/about/training> – bookmark site for ease of use!
- eLearning site has a number of training resources available. Instructor led courses available for registration.
- Knowledge Base: How to Guides – broken up by different work streams and subscribe to updates.
- Hands-On Environment (does not include all converted data)
- Approval Routing – practice available
- Foundational Learning – Chart of accounts is the most important to understand. Video trainings available.
- Access Aggie Enterprise
- When logging in...use “Company Single Sign-On” using UCD credentials!
- Start with your security liaison in your department to find out your roles.
- Where to begin? AggieEnterprise recommended actions to start exploring.
- Have hands on environment open while do training.
- Suggestions:
 - Understand new chart of accounts,
 - practice new business processes as a team,
 - create opportunities for dialogue and knowledge sharing.
 - Gain understanding of the PPM subledger versus the General Ledger.
 - Gain understanding of how cost transfers are handled in AE.
 - Understand the different roles, who is allowed to initiate and approve, and the various levels.
 - Understand the workaround for the shopping cart.

Common Reports

- Decision support retiring, available for a short period.
- AE supported by Oracle for reporting with some extended reports through Cognos.
- Existing KBAs (knowledge base articles)
 - Inquire on Detail Balances (similar to DS)
 - Many sort and filter options
 - Export data to Excel
 - Transaction Listing Report

- PPM Project Costs – Transaction Listing
- Department P&L
- General Ledger Summary Report
- PPM Faculty and Department Portfolio Report
- Reviewing the Portfolio Report
- Faculty Session 10.20.23 on Zoom – Faculty-facing and staff who support faculty.
- Chart of Accounts
 - UAT CoA Crosswalk for Testing for practice transactions
- Super Users
- Office Hours available – Open Q&A and SMEs available from each work stream available
- AggieEnterprise Service Desk
- Scavenger Hunt through October 31

All links available in the slide deck!

submit questions in Service now at:

https://servicehub.ucdavis.edu/servicehub?id=ucd_cat_item&sys_id=69aaee7a1bf7291094087bff034bc48

Explore and subscribe to the “Cutover and Freeze Date Guidance” Knowledge Base article:

<https://kb.ucdavis.edu/?id=9865>

A cutover calendar, supported by Google calendars, can be found at the bottom of each page on the Aggie Enterprise website: <https://aggieenterprise.ucdavis.edu/>

Visit the modules pages on the Aggie Enterprise website <https://aggieenterprise.sf.ucdavis.edu/ae-modules>

Find the recommended training courses based on your user role:

<https://aggieenterprise.ucdavis.edu/aggie-enterprise-user-role-training-matrix>

Open enrollment is available for PPM instructor-led training: Non-Sponsored Project Creation & Management (PPM 200.1). Search for “PPM 200.1” in the UC Learning Center, and express interest:

<https://lms.ucdavis.edu/>

Explore the growing list of articles in the Aggie Enterprise Knowledge Base:

https://servicehub.ucdavis.edu/servicehub?id=ucd_kb_view2&sys_id=dd65c70b1b5039904690ea04604bcbc9&spa=1

CoA Resources are organized in recommended order in the CoA Resources guide:

<https://ucdavis.box.com/s/k4sd794d804ih9kyczr0v7ehymyby3zx>

Links to log in are available on the Hands-on Environment webpage:

<https://aggieenterprise.ucdavis.edu/resources/hands-on-environment>

Your unit’s security liaison is the point of contact for any access requests, including for new employees.

Find your liaison here: <https://aggieenterprise.ucdavis.edu/support/access>

The Orientation Guide provides a roadmap to help you get started:

<https://ucdavis.box.com/s/b3xyptsx530air2v7kvieausioal2njhv>

Visit the Hands-On Environment webpage for the Office Hours calendar and associated Zoom links:

<https://aggieenterprise.ucdavis.edu/resources/hands-on-environment>

The PPM/ POET(AF) Quick Reference Guide is available through the PPM webpage:

<https://ucdavis.box.com/s/lfe5ijesbyt4n7yizm5h9ewtmhxsosk4>

Sharing links to the step-by-step articles now.

Similar to Decision Support 1 - Review GL Balances and Drill through to Sub Ledger Balances:

<https://kb.ucdavis.edu/?id=9756>

Similar to Decision Support 2 - Run the UCD Transaction Listing Report: <https://kb.ucdavis.edu/?id=9757>

Similar to Decision Support 193 - Run the General Ledger Summary Report:

<https://kb.ucdavis.edu/?id=9759>

Similar to Decision Support 193 - Run the Department P&L Report: <https://kb.ucdavis.edu/?id=9758>

The faculty session is open to faculty and department staff who support faculty. Please register to join us on Friday, 10/20, from 12:30 – 1:00: <https://aggieenterprise.ucdavis.edu/events/aggie-enterprise-faculty-forum>

Reference the UAT CoA Crosswalks as you process practice transactions:

<https://ucdavis.box.com/s/uunoejero7z0ctxtku93eyhvm2y9s1p>

Department mapping leads are a great resource for questions specific to your unit's mapping:

<https://ucdavis.box.com/s/5t4lbidm0xwyo9iuw4q5v561v4v2q18q>

Find your unit's Super User(s): <https://aggieenterprise.ucdavis.edu/support/superusers>

Visit the Hands-On Environment webpage for the Office Hours calendar and associated Zoom links:

<https://aggieenterprise.ucdavis.edu/resources/hands-on-environment>

Submit your questions:

https://servicehub.ucdavis.edu/servicehub?id=ucd_cat_item&sys_id=69aaee7a1bf7291094087bff034bc_b48

Participate in the Aggie Enterprise scavenger hunt, open through October 31st:

<https://ucdavis.box.com/s/nsf1sq5fhj2egmbh9xmeygyewyxcikoe>