

UC ANR Aggie Enterprise Go-Live Checklist

| <i>For everybody</i> | | |
|--|---|-----------------------------|
| Action Item | Details | Start Date |
| Bookmark UC ANR Aggie Enterprise webpage on your computer: https://ucanr.edu/sites/AggieEnterprise/index.cfm (must be logged in to UC ANR portal) or click link at top of UC ANR portal home page. | Refer to these pages as needed for links to key materials, training, and information on the Aggie Enterprise project. | Now |
| Learn about the new Chart of Account (CoA) segments | The foundation to successfully adopting Aggie Enterprise is understanding the new UC Davis Chart of Accounts. Review the Chart of Accounts Resources Guide . FAU to CoA-PPM Crosswalk tools are also available, showing how existing FAU values have been converted to the new CoA and POET chartstrings | Now |
| Complete training | For questions about training related to your role(s), collaborate with UC ANR's Aggie Enterprise Security Liaisons . | Now |
| Explore the Hands-On Environment | Use the Orientation Guide to practice activities that apply to you. Tip: As you explore reports, make a list of those you want to "Add to Favorites" in the new Aggie Enterprise financial system. | Now |
| Log in to Aggie Enterprise using your UC Davis credentials. (The Aggie Enterprise financial system login will be added to the UC ANR Aggie Enterprise website and to this checklist after go-live.) | Follow login instructions , be sure to use "Company Single Sign-On" and watch the Navigating Aggie Enterprise video. For any issues logging on, please create a UC ANR Aggie Enterprise help ticket (KACE help system). | 1/4/24 |
| Personalize your Aggie Enterprise Springboard (homepage), including Accessibility Settings | Follow the instructions to personalize your homepage and establish accessibility settings. | 1/4/24 |
| Attend Office Hours, as needed, for your applicable work area | Finance, Project Portfolio Management, Supply Chain Management, Security/System Access, and UCPath: Monday-Friday 10:00am to noon and 1:30 to 4:00pm | 1/4/24 (thru March 2024) |

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| | https://ucanr.zoom.us/j/5304004429?omn=97299799640 Meeting ID: 530 400 4429 (More details to follow) | |
| Know where to go to submit your questions or issues with Aggie Enterprise | All help requests start with a UC ANR Aggie Enterprise help ticket (KACE help system) | 1/4/24 |

If you are involved in purchasing

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|---|--|------------|
| Make sure you know what GL or PPM chart string you will use | Understanding what Charge Account string or PPM Project Number to use for a purchase can help ensure that your purchases are appropriate and compliant with all applicable university, state, and federal policies and regulations. Review the guidance outlined in the Identifying Appropriate Charge Account or PPM Project for Requisitions Knowledge Base Article. | Now |
| Set your Requisition Preferences | If you have a role that requires purchasing (e.g., fill a shopping cart or create a requisition), follow the Getting Started: Requisition Preferences Screen guide. | 1/4/24 |

If you are involved in Sponsored and/or Non-Sponsored Project Management in PPM

| Action Item | Details | Start Date |
|--|--|------------|
| Review Faculty Project Review and Non-Faculty Project Review files to identify projects where task structure was updated by Central Finance to support conversion. | Faculty Project Review and Non-Faculty Project Review files are available in Department Mapping Box folders. Contact your unit's mapping lead(s) if you do not have access. To address tasks that were auto-populated, see the action below. | Now |
| Update any PPM Faculty or non-sponsored task names and numbers that were mapped to default task values, incorrect Project Manager or incorrect PI. | Refer to the Adding and Managing Tasks for PPM Non-Sponsored Project Knowledge Base Article for guidance. | 1/4/24 |
| Check the PI assigned to each Faculty Project | Did it map correctly? If not, update the PI using the Adding a Principal Investigator and/or Updating Project Manager on a PPM Non-Sponsored Project guide. | 1/4/24 |
| Check the Project Manager assigned to each Faculty, Department and Sponsored Project | Did it map correctly? If not, update the Project Manager using Adding a Principal Investigator and/or Updating Project Manager on a PPM Non-Sponsored Project guide. | 1/4/24 |

Ensure that Faculty and Department project budgets match the ending balance in KFS.

Knowledge Base Article coming soon.

Mid-January.
Exact date to be determined, based on when December final balances are loaded into AE.