

08:41:09 From eecklund to Everyone:
Monthly closed ledgers still 7/8th business day of month to run reports?

08:44:06 From Alyssa Henry to Everyone:
How/where do we see in AE that the ledgers have closed?

08:44:32 From eecklund to Everyone:
Reacted to "Monthly closed ledge..." with 👍

08:44:44 From Asheley Greenlee to Everyone:
<https://aggieenterprise.ucdavis.edu/month-end-close>

08:44:55 From Alyssa Henry to Everyone:
Reacted to "https://aggieenterpr..." with 👍

08:46:23 From Alyssa Henry to Everyone:
Are we still submitting SRFs via email or do these need to be done via a help ticket?

08:48:00 From Colleen Burke-Pitts to Everyone:
Is there any update about when new purchase order numbers will be created to pay invoices for subawards?

08:48:02 From Jennifer Gouine to Everyone:
When will PPM data show up in GLIDE reports?

08:48:04 From Juanita "JC" Garza-Castro to Everyone:
Do you want us to submit the tickets through Service Now or to a specific email to your department? Sorry if you mentioned this already.

08:48:30 From Bea Rans Strong - UC Davis to Everyone:
Requesting a subaward to SPO still requires a subaward request form submitted to Subawards@ucdavis.edu

08:48:49 From Gwen Caramanica to Everyone:
Reacted to "Is there any update ..." with 📌

08:48:55 From Yevgeniy Gnedash to Everyone:
Lenora mentioned that since cost transfers don't have an attachment feature, the departments might need to keep that back up on file (previously uploaded to KFS docs). Can you touch on that in terms of what the expectations are for the department in terms of quality, quantity, duration, accessibility, etc for that back up?

08:48:58 From Gwen Caramanica to Everyone:
Reacted to "https://aggieenterpr..." with 👍

08:49:42 From Lynette to Everyone:
Are balances now correct on grant awards. Will the reporting show correct balance when we run the report?

08:49:49 From Gwen Caramanica to Everyone:
Reacted to "Lenora mentioned tha..." with 📌

08:49:54 From Debra Henn (she/her/hers) to Everyone:
Yev, we're keeping the backup on the service ticket

08:50:02 From Stephanie R Farver to Everyone:
Reacted to "Is there any update ..." with 👍

08:50:13 From Yevgeniy Gnedash to Everyone:
What about department initiated transfer that don't go through CGA?

08:50:24 From Debra Henn (she/her/hers) to Everyone:
Balances are still being reviewed, to my knowledge.

08:50:51 From Juanita "JC" Garza-Castro to Everyone:
Reacted to "Lenora mentioned tha..." with 

08:51:00 From Lynette to Everyone:
Thanks, Debra

08:51:10 From Gregory Zebouni to Everyone:
Should we be concerned with the 120 day limitation on federal transfers if we have tickets that are submitted weeks ago but are stuck at CGA?

08:51:57 From vwebster to Everyone:
Reacted to "Lenora mentioned tha..." with 

08:52:06 From vwebster to Everyone:
Removed a  reaction from "Lenora mentioned tha..."

08:52:28 From Debra Henn (she/her/hers) to Everyone:
We're being pretty loose if the 120th day was during the blackout period. If you're requesting now and it's over 120 days, you'll need a justification. It's included in the template.

08:52:32 From jafletch to Everyone:
Reacted to "Requesting a subawar..." with 

08:54:35 From Asheley Greenlee to Everyone:
We have sponsors who are threatening that we will need to return funds if they aren't invoiced. How can we help these kinds of invoices get escalated?

08:54:47 From Hal Brunette to Everyone:
Reacted to "We have sponsors who..." with 

08:55:00 From Rani Asato to Everyone:
is there a way to see the balance that was transferred over from DS Dec 2033?

08:55:01 From Pamela Keach to Everyone:
Reacted to "We have sponsors who..." with 

08:55:16 From SOE to Everyone:
Is there or will there be a General Ledger Summary report that is by Project - not Financial Department?

08:55:42 From Monica Martinez to Everyone:
Reacted to "We're being pretty l..." with 

08:55:59 From Leslie Lipman (she/her) to Everyone:
Reacted to "Is there or will the..." with 

08:56:55 From Jennifer Mongoven to Everyone:
If PPM is not in the GLIDE report, how can we report to faculty / funders on the specific non-personnel cost charged to the project? Where can we find detailed information on charges?

08:57:09 From Leslie Lipman (she/her) to Everyone:
Reacted to "If PPM is not in the..." with 

08:57:21 From Jennifer Gouine to Everyone:
Reacted to "If PPM is not in the..." with 

08:57:48 From Debra Henn (she/her/hers) to Everyone:
Jennifer, I think you want to look in Manage Project Costs

08:57:55 From Hal Brunette to Everyone:

Reacted to "Jennifer, I think yo..." with 👍

08:58:29 From Monica Martinez to Everyone:

Reacted to "If PPM is not in the..." with 👍

08:58:38 From Jennifer Gouine to Everyone:

Manage Project Costs doesn't give the level of detail PIs and Sponsors are looking for. For example: "Subscription. \$29.99" How can we see what the subscription was and who purchased it?

08:58:48 From Monica Martinez to Everyone:

Reacted to "Manage Project Costs..." with 👍

08:58:48 From Yevgeniy Gnedash to Everyone:

For closeout, what is the most accurate report to ensure our grants are spent out? For example, the award screen shows a 0 balance, but should i be running a separate report to ensure that is correct?

08:59:02 From Mia Bartholomew to Everyone:

Reacted to "Manage Project Costs..." with 👍

08:59:10 From Debra Henn (she/her/hers) to Everyone:

For 2023 expenses, use the DS reports for detail

08:59:12 From Jennifer Mongoven to Everyone:

Replying to "Jennifer, I think yo..."

I don't think that gives me any additional information. I'll try again, but I feel like we attempted that strategy.

08:59:14 From Elizabeth Vang to Everyone:

Regarding the PI Ledger Review process - is it the Dept RA's responsibility to schedule the recurring UCD Dept/Faculty Portfolio report and have it sent to the PI monthly?

08:59:37 From Jennifer Mongoven to Everyone:

Reacted to "Manage Project Costs..." with 👍

09:00:41 From Elizabeth Vang to Everyone:

Replying to "Regarding the PI Led..."

Additionally, does this scheduled report replace the previous "acknowledgement" button in the DS PI Ledger Review?

09:00:46 From Debra Henn (she/her/hers) to Everyone:

Elizabeth, yes, the RA or someone in the dept

09:01:34 From Gregory Zebouni to Everyone:

Is there an update on the new Cost Share system?

09:02:03 From Monica Martinez to Everyone:

Replying to "Manage Project Costs..."

I agree with you - not enough detail and couldn't see much more when i drilled down

09:02:17 From Daniel Chang to Everyone:

Reacted to "Manage Project Costs..." with 👍

09:02:19 From Devon G Bradshaw to Everyone:
Reacted to "Is there an update o..." with 👍

09:03:00 From Yevgeniy Gnedash to Everyone:
We really need a cross-stream training that brings CGA, central campus, etc folks together that can put these different pieces together.

09:03:05 From Kristina to Everyone:
Which AE report is similar to DS256?

09:03:15 From Emily Woods to Everyone:
Reacted to "We really need a cro..." with 👍

09:03:17 From Jennifer Mongoven to Everyone:
Reacted to "Which AE report is s..." with 👍

09:03:18 From Nena Herrera to Everyone:
Reacted to "We really need a cro..." with 🎯

09:03:20 From Melanie K Lansford to Everyone:
Reacted to "We really need a cro..." with 🎯

09:03:21 From Becca Callahan-Petrucci to Everyone:
Reacted to "We really need a cro..." with 👍

09:03:23 From Gwen Caramanica to Everyone:
Reacted to "We really need a cro..." with 🎯

09:03:26 From Maggie Gonzalez to Everyone:
Reacted to "We really need a cro..." with 🎯

09:03:27 From Jennifer Banuelo (she/her) to Everyone:
Reacted to "We really need a cro..." with 👍

09:03:31 From Emily Woods to Everyone:
Reacted to "Manage Project Costs..." with 👍

09:03:47 From Jennifer Gouine to Everyone:
Reacted to "We really need a cro..." with 👍

09:03:48 From vwebster to Everyone:
Reacted to "We really need a cro..." with 🎯

09:03:48 From Monica Martinez to Everyone:
Reacted to "I don't think that g..." with 👍

09:04:15 From Debra Henn (she/her/hers) to Everyone:
<https://aggieenterprise.ucdavis.edu/reports> has what is available as far as a report crosswalk

09:04:31 From Patty Munoz to Everyone:
Reacted to "We really need a cro..." with 👍

09:04:32 From dlarkins to Everyone:
Reacted to "Manage Project Costs..." with 👍

09:04:32 From dlarkins to Everyone:
Reacted to "Manage Project Costs..." with 👍

09:04:39 From dlarkins to Everyone:
Reacted to "We really need a cro..." with 👍

09:04:39 From dlarkins to Everyone:
Reacted to "We really need a cro..." with 🍷

09:04:42 From dlarkins to Everyone:
Reacted to "Which AE report is s..." with 👍

09:05:22 From Pamela Keach to Everyone:
YES. Workshop format for reporting

09:05:29 From Eva Jakab to Everyone:
Reacted to "We really need a cro..." with 👍

09:05:29 From Jennifer Gouine to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:05:32 From lynette to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:05:39 From Stephanie R Farver to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:05:41 From Emily Woods to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:05:48 From Emily Woods to Everyone:
Reacted to "https://aggieenterpr..." with 👍

09:05:49 From Jenna Wills to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:06:30 From A. Sharma to Everyone:
Reacted to YES. Workshop format... with "👍"

09:06:34 From Kristina to Everyone:
Replying to "YES. Workshop format..."

I have requested this in many other areas too but I have not seen anything yet.

09:06:39 From Danette Howard to Everyone:
Reacted to "YES. Workshop format..." with 👍

09:06:40 From Pamela Keach to Everyone:
Replying to "YES. Workshop format..."

KB only gets you so far

09:06:47 From Danette Howard to Everyone:
Reacted to "KB only gets you so ..." with 🍷

09:06:54 From Colleen Burke-Pitts to Everyone:
Reacted to "is there a way to se..." with 👍

09:06:56 From lynette to Everyone:
Reacted to "KB only gets you so ..." with 👍

09:07:06 From Farm Saetern to Everyone:
Is there a glossary defining all the terminologies in AE? Does Oracle have such a glossary?

09:07:17 From Kristina to Everyone:

Replying to "YES. Workshop format..."

KB is great but it can't be the only tool.

09:07:50 From Asheley Greenlee to Everyone:

Replying to "Is there a glossary ..."

<https://aggieenterprise.ucdavis.edu/resources/glossary>

09:08:31 From Rolando to Everyone:

I agree

09:08:35 From Farm Saetern to Everyone:

Reacted to "https://aggieenterpr..." with 👍

09:08:37 From Pamela Keach to Everyone:

Reacted to "I agree" with 👍

09:08:37 From Hue To to Everyone:

I agree

09:08:39 From Katie to Everyone:

Couldn't agree more

09:08:39 From Brooke Curry to Everyone:

Replying to "Is there a glossary ..."

Good point Farm. I've already encountered new AE terminology using the same as SPO, but the meanings have changed for AE, creating confusion.

09:08:46 From Danette Howard to Everyone:

Reacted to "Couldn't agree more" with 🤔

09:08:49 From Jennifer Mongoven to Everyone:

Reacted to "Couldn't agree more" with 👍

09:08:49 From Danette Howard to Everyone:

Reacted to "I agree" with 🤔

09:08:51 From Danette Howard to Everyone:

Reacted to "I agree" with 🤔

09:09:01 From Juanita "JC" Garza-Castro to Everyone:

Reacted to "Couldn't agree more" with 👍

09:09:02 From Christine Truesdale to Everyone:

Reacted to "Couldn't agree more" with 👍

09:09:09 From SOE to Everyone:

True

09:09:17 From Katie to Everyone:

Reacted to "Couldn't agree more" with 👍

09:09:18 From Katie to Everyone:

Removed a 👍 reaction from "Couldn't agree more"

09:09:18 From Katie to Everyone:

Reacted to "Couldn't agree more" with 👍

09:10:07 From Ashley Carr to Everyone:

Absolutely, we are more than willing to help develop these processes as the 'boots on the ground'

09:11:04 From Sarah Shroyer to Everyone:

I've found Review Project Performance (Resource Structure) helpful as I can view by accounting period. This is under Projects/Project Financial Management.

09:12:27 From Leslie Lipman (she/her) to Everyone:

Since other campus's have this system. Do they have info they can share?

09:12:36 From Jennifer Gouine to Everyone:

Reacted to "Since other campus's..." with 👍

09:12:40 From Brooke Curry to Everyone:

Reacted to "Since other campus's..." with 👍

09:12:45 From Alyssa Henry to Everyone:

Replying to "I've found Review Pr..."

Sarah, what specifically have you found this helpful for?

09:12:48 From Leslie Lipman (she/her) to Everyone:

Replying to "Since other campus's..."

Seems weird we are starting from scratch

09:12:52 From dlarkins to Everyone:

Reacted to "Since other campus's..." with 👍

09:12:53 From dlarkins to Everyone:

Reacted to "Since other campus's..." with 👍

09:12:58 From Nick Montero to Everyone:

Reacted to "Since other campus's..." with 👍

09:13:15 From Kristina to Everyone:

Reacted to "Since other campus's..." with 👍

09:13:21 From Hal Brunette to Everyone:

Reacted to "Since other campus's..." with 👍

09:13:39 From Sarah Shroyer to Everyone:

Replying to "I've found Review Pr..."

Verifying 12/31 balances and getting costs for a period on sponsored projects. Dept and Faculty portfolio report is cumulative.

09:13:53 From Alyssa Henry to Everyone:

Reacted to "Verifying 12/31 bala..." with 👍

09:14:08 From Sarah Shroyer to Everyone:

Replying to "I've found Review Pr..."

There is no need to run a report and I think PIs will like it a lot

09:15:30 From Gregory Zebouni to Everyone:

Is there an update on the new Cost Share system?

09:15:42 From Monica Martinez to Everyone:

Reacted to "Since other campus's..." with 👍
09:16:48 From Leslie Lipman (she/her) to Everyone:
Replying to "Is there an update o..."

what about 3rd party and inkind?
09:17:22 From Linda Jb Zhao to Everyone:

Reacted to "what about 3rd party..." with 👍
09:18:13 From Tara Barbier to Everyone:

James - how will the CGA team know which fund type will be used on the Cost Share project? Can only 1 fund # be used on each project?

09:18:58 From Gwen Caramanica to Everyone:

So we will also need to move the revenue from the cost share fund source to the cost share project to cover those costs. Correct?

09:19:09 From Jennifer Torres to Everyone:

If we have cost share due should we be completing in the old system or should we wait and submit in AE

09:19:49 From Gwen Caramanica to Everyone:

Reacted to "what about 3rd party..." with 📌

09:20:03 From Jennifer Gouine to Everyone:

Reacted to "If we have cost shar..." with 👍

09:20:33 From Kevin Waterson to Everyone:

what about extramural projects which are cost shared against other extramural projects? They will both be set up with their own project numbers.

09:20:54 From Danette Howard to Everyone:

Reacted to "Since other campus's..." with 👍

09:23:34 From Farm Saetern to Everyone:

Thank you James and the CGA Team!!

09:23:35 From Sarah Shroyer to Everyone:

Thank you!

09:23:40 From Jenna Wills to Everyone:

Thank you!

09:23:43 From Pamela Garl to Everyone:

Thank you!

09:24:41 From Jennifer Gouine to Everyone:

Yes, big thank you to everyone at CGA!

09:25:45 From Jennifer Mongoven to Everyone:

Thank you!!!

09:27:52 From Maureen Ramirez to Everyone:

Sorry if I missed this. This is for CGA. For subaward invoices, are we using the same PO#? Mine are being rejected saying that I didn't enter the PO#. I did enter the old PO# in the invoice request. Is CGA setting up new PO#?

09:32:25 From Gwen Caramanica to Everyone:

Kelly, these are great slides! Would you kindly send a copy to the ovcr-cg list?

09:33:42 From Perry King to Everyone:

See past research forum materials including recordings at <https://research.ucdavis.edu/proposals-grants-contracts/spo/spo-training/> in the 'Research Administration Forums' accordion box towards the bottom of the screen.

09:33:51 From Maureen Ramirez to Everyone:

What is the minimum cost share for federal grants with no paid effort?


09:34:17 From jafletch to Everyone:

Thanks James and Kelly! Great presentations!

09:35:36 From Sharon Misewich to Everyone:

Would it be possible to share the slides in teams research admin community?

09:35:48 From Ann Parisi, UC Davis to Everyone:

Reacted to "Would it be possible..." with 

09:35:54 From Perry King to Everyone:

Yes, I'll share the slides there.

09:36:24 From Sharon Misewich to Everyone:

Replying to "Yes, I'll share the ..."

thank you


09:37:02 From Ulrike Kreutzer to Everyone:

So all of those persons on a proposal that are listed as "collaborators" without salary and provide a letter now have to specify effort and be included on all budgets and personnel lists? What about non-UCD collaborators?


09:38:00 From Alyssa Bunn to Everyone:

Hi Ulrike- this does not apply to title codes with no required effort such as Other Significant Contributor.

09:38:10 From Ann Parisi, UC Davis to Everyone:

Reacted to "Yes, I'll share the ..." with 

09:38:33 From Ulrike Kreutzer to Everyone:

Reacted to "Hi Ulrike- this does..." with 

09:38:42 From Jennifer Gouine to Everyone:

Grace, thank you for sending AOR signatures so quickly with urgent last-minute requests. It is appreciated!


09:38:44 From Perry King to Everyone:

Subawards Lab - Thursday, March 7, 2024, 1 - 4 PM

In this hands-on class, participants will put into practice the topics covered in the 'Processing Subawards (Cayuse)' course. Using case studies, sample Notices of Awards, sample budgets, and group discussion, participants will gain experience processing complex subawards with instructors on-hand to answer questions.

https://uc.sumtotal.host/rcore/c/pillarRedirect?relyingParty=LM&url=app%2fmanagement%2fLMS_ActDetails.aspx%3fActivityId%3d556540%26UserMode%3d0&domain=8

09:39:19 From Grace I Liu to Everyone:

Reacted to "Grace, thank you for..." with 

09:39:26 From Perry King to Everyone:

Preparing a Proposal Budget: Lab - Thursday, March 21, 2024, 9 AM - 12 PM

Participants will put into practice the topics covered in the 'Preparing a Proposal Budget: Basics' eCourse. Using case studies, sample forms and group discussion, participants will practice completing a proposal budget. Applied activities include determining budget categories, applying and calculating the correct F&A rate, and creating a budget justification.

Prerequisite: Preparing a Proposal Budget: Basics (eCourse)

https://uc.sumtotal.host/rcore/c/pillarRedirect?relyingParty=LM&url=app%2fmanagement%2fLMS_ActDetails.aspx%3fActivityId%3d78001%26UserMode%3d0&domain=8

09:40:17 From Michael Hess to Everyone:

These labs are in person?

09:41:11 From Stephanie R Farver to Everyone:

You would use the same 6 digit PO number

09:41:22 From Jackie Dalke to Everyone:

Will open invoices in Kualu have payments applied? Or will they remain open since the system is no longer in use?

09:42:20 From Kevin Waterson to Everyone:

You can print as a pdf and edit that version

09:42:28 From Melanie K Lansford to Everyone:

If you print to PDF it usually unlocks that signature block so you can edit


09:43:19 From Brooke Curry to Everyone:

Reacted to "If you print to PDF ..." with 

09:43:25 From Patty Munoz to Everyone:

Reacted to "If you print to PDF ..." with 

09:43:28 From Brooke Curry to Everyone:

Reacted to "You can print as a p..." with 

09:44:06 From Maureen Ramirez to Everyone:

I just emailed the contact and asked them to put it on the invoice.

09:44:23 From Maureen Ramirez to Everyone:

Our PO#.

09:44:34 From Rolando to Everyone:

Agree

09:44:46 From Gwen Caramanica to Everyone:

Replying to "Will open invoices i..."

This might be a good question for Supply Chain Office hours.

<https://aggieenterprise.ucdavis.edu/events?page=1>

09:45:06 From Kristina to Everyone:

Reacted to "Agree" with 

09:45:14 From Asheley Greenlee to Everyone:

Much appreciated! Looking forward to seeing that

09:45:59 From Bill Tuck to Everyone:

Thank you

09:45:59 From Nick Montero to Everyone:

thank you

09:46:02 From Kristina to Everyone:

Thank you, SPO!

09:46:05 From Janelle M Kohl (she/her) to Everyone:

Thank you