DGA Roundtable Minutes – Sept 9, 2019

**1:30 – 2:30 pm, IRIC 305 (above the Atrium)**

Call-in Number: Zoom Join from PC, Mac, Linux, iOS or Android: <https://uidaho.zoom.us/j/687069559>

– See Calendar Invite for additional details on zoom access.

Zoom: Please remember to mute your zoom microphone unless you are speaking.

IRIC participants: Please remember that side conversations during the discussions make it difficult for our off-campus and other zoom participants to hear and participate.

**Resources:**

DGA Mentor List: <https://www.uidaho.edu/research/faculty/dga#accordion-row-179357d9-8e0e-4cd4-94a5-1d3017d84286->

DGA Minutes and past handouts: <https://www.uidaho.edu/research/faculty/dga#accordion-row-4a8789b0-2d5b-426d-9175-eb516e227425->

DGA resource page on OSP site (helpful for PIs too): <https://www.uidaho.edu/research/faculty/dga>

1. **Greetings and Introductions**
   1. **Reminder**: Please utilize sticky notes for questions/comments that are not relevant to the whole group, or for additional questions when we are running short on time. Please write your email and the topic that you are referencing (or speaker name) so that we can get the question to the correct presenter. For zoom- please send a chat message or email (to Ann-Marie or Sarah).
2. Updates/Announcements

First Announcement: Deb Shaver, Asst. Vice President for Research Administration – Deb would like feedback (to [dshaver@uidaho.edu](mailto:dshaver@uidaho.edu)) on a new process that we will be implementing. OSP would like to move forward with an automatic transfer of any costs that are unallowable/over budget/etc. to a designated college level account. This removes the need for any immediate action from the DGA/PI, and also allows OSP to timely move forward with the cost transfer/overage transfer and close the budget/invoice/etc. Each department will have 30 days to provide an index. If after 30 days an index is not provided, OSP will use the F&A return index. If you see any issues with this methodology, please email [dshaver@uidaho.edu](mailto:dshaver@uidaho.edu).

Questions/Notes from Chat:

From Theresa Albright to Everyone: 01:43 PM

I like the idea that it gets moved by OSP. Many times I don't have time to always do get things done when needed!

From vmheadtke to Everyone: 01:43 PM

F&A indexes have a spending hold this year. A gift account would be a better choice. Will the cost transfer come through our approval queue? If so we could change the budget before approving. The transfer will be communicated via email and will not go through your approval queue. You will have 30 days to provide an index you wish to use (i.e. gift acct). If we do not hear from you after 30 days, we will use the F&A return index.

From Theresa Albright to Everyone: 01:45 PM

The approval is an area that will be huge in for this matter. Using a gift account is what I thought too. It sounds like it will be a College index not an individual PI account. See answer above.

Second announcement: Mikayla Frey has left the university and we are currently looking for someone to fill her spot on the DGA Roundtable Committee. Eric Everett and Michele Mattoon gave a brief history of the creation of the committee and of the work they have done to address the topics gathered by the DGA Survey last December. The committee participates in future meeting planning and assigns tasks to members each month associated with securing content experts from across campus to deliver presentations. Michele and Eric went on to describe the time commitment involved as being one meeting per month lasting one hour and usually one or two follow up emails. If you are interested in filling that position, please email [abilderback@uidaho.edu](mailto:abilderback@uidaho.edu) to volunteer to participate.

Third announcement: Chrome River update – Eric Everett let the group know that Ron Town and Linda Campos announced at CUIBO that they will be including the first 35 characters of every item description. This should help with expense reporting into Banner. Terry Evans shared with the group that he was told to begin the entry with the name of the vendor – for example ‘Amazon – gizmo…’. No timeframe was given for implementation of the new feature to Chrome River, however, Eric recommended that DGAs start putting this into practice now.

Question from the group: Ling wants to know what happened to 90-60-30 close report. Did it disappear? Ling wants to know why they are getting notices about a grant closing in 5 days, rather than notices 30 days ahead of time. What report can they get to show a grant is closing. Ling wants to know replacement report goes to PIs for this purpose.

1. Pivot tables and Argos Reports – Kenwyn Richards, OSP Cost Accounting.

Special note: PIs can access FRAGRNT, FRIGITD, FWRITEM if they take navigation training. Contact Kenwyn if you want to help a PI do this. The PI can also gain access to Argos if they wish. They will need to specifically request this.

FWRITEM – can use notepad++ if the transactions are off due to spacing.

Kenywn has instructions for each of these screens to help PIs and DGAs. These instructions have been sent separately.

Kenywn created a balance summary table which is a mirror of FRIGITD. Kenwyn will share the template so that you can use it to dump your data in. You then dump your data in and override the first line of tab ‘grant transactions’ with your data. The expense summary tab is identical to the FRWITEM report and she added filters so you can look at it different. Note: the first time one uses the template, they will need to look at the grant code filters in each pivot table and make sure the items listed have a check box in order for the information to be visible. Please contact Kenwyn with specific questions.

DGAs would like instructions on how/where to find cost share detail. Such as ‘what is in Banner vs. Page builder, how to tell what your total CS obligation is, etc. We are working on these. Please stay tuned…

Note: PBSR report in ARGOS does not work well for grants with multiple funds – b/c it runs only by fiscal year. Kenwyn will work with Ron to get a grant code query function on this report. It does work for one fund and in a single FY. Does FRWSUMR work?

Eric said that the vandal self-service report in vandalweb is too cumbersome for PIs and that the access to the Banner screens for PIs would be helpful.

From CHRISTINA ROE IN CHAT: 1. I would greatly appreciate assistance transferring costs off if I am having time issues. However, sometimes I am asked to transfer something off that I have already processed. Is there an easy way I can check if the item was already transferred so it doesn't happen twice? All transfers can be viewed in the transaction detail report. You can filter on accounts related to transfers to see all transfers. 2. With the FWRITEM report I ran into a formatting issue with a couple of transactions. Finaccess assisted me by showing me how to use notepad++. You can edit the report there. Something to know in the event someone needs assistance. 3. What about giving PIs access to ARGOS and BANNER? PIs can also request access to Argos if they wish.