DGA Roundtable Minutes – May 6, 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/9971473726>

– 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.

1. **Greetings and Introductions**
2. **Update on VERAS –**
	1. Veras.uidaho.edu – all proposals (including continuations and supplements) go into VERAS now. No new proposals to EIPRS. If new proposals are started in EIPRS, a comment will be left instructing PI to move the proposal to VERAS and then the EIPRS proposal will be removed.
	2. Contact your SPA with questions.
3. **Budget Monitoring and Projections –**
	1. **Presenters – Michele Mattoon CMCI, Mollyann Jones IBEST**
		1. Molly and Michele both presented two different ways to use a spreadsheet for budget tracking and spending projection. Argos can be used to pull the data that is entered into the expenditures sections of each spreadsheet, as can FRIGITD and NHIDIST in Banner.
		2. Molly uses NHIDIST to pull the most recent payroll and then adds the pay (regardless of type) for each person/employee during that period, to calculate the bi-weekly pay for that person to use in the projection.
			1. The Argos payroll detail report can function in the same manner. If you utilize the payroll detail report, whether by employee, fund or org, you are able to export the info as a CSV file, and then use the auto sum etc. options to get totals. This removes the human error from adding together salaries and fringes for individuals.
		3. Michele uses FRIGITD and checks ‘by sponsor account’ to get a summary of expenditures by primary expense category for each grant code and index combo. You can use ‘by fund summary’ in addition to the ‘by sponsor account’ to get a picture by index as well, for multiple index/fund grant codes.
4. **Pivot Tables and Argos –**
	1. **Presenter - John Brabb**
		1. John provided a great PowerPoint walk-through of the use of Argos to create a pivot a table. The PowerPoint is attached.
		2. Once you have a pivot table, it takes 30 seconds to refresh the data from Argos, so that you can use that table each month.
		3. John has offered to be a mentor in this area, so if you have questions you are welcome to contact him at jbrabb@uidaho.edu. Kenwyn Richards (kenwynr@uidaho.edu) is also a great resource for Argos and Pivot tables.