DGA Roundtable Minutes - November 4, 2019

1:30- 2:30 pm, IRIC 105

**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. **Greeting and Introductions**

Meeting started – audio a problem – questions coming from Chat on Zoom will be answered.

1. **Chrome River Reports – Travis Gray**

- After signing in to single sign on – go to Banner and then Chrome River

- Navigate to analytics from the navigation pane along the left side of the screen.

- Can add to favorites.

- Going through some expense reports

- Does not have ability to put in org/fund hierarchy – need to do things more simplified.

- Expense report by fund – not a lot of flexibility

- CR Export Date - Beginning Date range - Preferred Start date – fund code -Hit Run – should create report – Report will show in upper left corner of screen - click on title to open – will download to downloads folder.

* Fund/org report – works same way – date range – fund and org – required parameters

If you get an error, make sure all parameters have something in them. Has to be exported or it will be hanging out there as a draft.

* All these reports – fund – org – etc. behave the same – can put in report number

Can look at reports that have been submitted – these are expense reports.

* Report number – presented with options – full pdf – pdf with receipts, etc.

Others work the same search by index or org.

Q - Question from Zoom – Using the reports can we get to other claims – claims that we are not delegates for? Yes, if you now all the parameters – index, fund, org, if you are not sure

A - May need to request analytics access if you do not have it.

* Report from Linda Keeney - Transactions not Exported for the entire university.

Go onto Banner and then to - Business systems – chrome river reporting – chrome river specific

1. **Chrome River – correctly processing student travel – Linda Keeney**

Student travel reporting on Chrome River (CR).

There are four classifications of students – they do have ways they can use students with their expenses on CR

1). T4 working with travel - Teaching, research assistant, etc.

Some colleges have purchasing cards for them – normal employee

2). Full time employee going back to classes

3). Student travelling with an employee – most students who are not working –

Other options – employee can purchase things on own purchasing card

Travel advances – disbursing per diem – works well if they are traveling with and emp.

4). Students non-emp travelling alone or with a group. If not an employee – same type of expenses can be put on purchasing card as with a speaker, etc.

* If you choose to have someone travelling with them can do ALL per diem as a group meal and not give them per diem. Out of pocket expenses – on claim voucher because they are not in CR. If they are not an employee and need $ up front – one way – part of award – as long as it doesn’t pertain to tuition it can go on a claim voucher (not taxable) –
* First step – where do the students fit in

Grad students on fellowship – treat the same as non-working student. Can get an advance on what they need.

If they are in a foreign country – they need to make sure the student is not in jeopardy – best if they have access to funds.

Participant has to be use as non-travel.

Q - Fellowship – previously RA – anyway to help him?

A - Doing participants as a claim voucher – can do it on non-travel through Chrome River?

If you are reimbursing them directly – say that on chrome river.

Cash advance – need something to show expenses

Q - Can Linda speak to how to create a travel pre-approval for a non-employee student, for example, one on a fellowship who is traveling for research? Would not be using pre-approval.

A - Compliance – coming soon

Preapprovals after the fact – moved to production – if it goes after the fact the approvals were set up – auto to traveler – supervisor – GL – additional step to supervisors/supervisor for approval.

Car classes changes to where you can see van, different car types, not from receipt of different vehicles – with more classes – warning will fire with intermediate, pickups, SUVs. Has to be a work related reason – state says most economical method.

Q - List of purchasing cards?

A - No way to produce this in CR – not stored in CR. By individual. To accomplish that – working with US Bank to get that information. Needed for fleet reports.

Reporting – more information on reports – able to put info in Foatext – in description piece instead of saying supplies/non-travel working to put more characters. Tested with 35 characters – too many words – caused all reports to bomb. Will see more information on this soon.

If $ is over the pre-auth it will process for that one – it is only after it has made it through the export that it closes. Encumbrance is something that will happen down the line.

1. **Updates/Announcements**

**Early Setup Form** **- Vicki**

Over view of the early setup form/clarification on why OSP requests the information and some of the issues that arise.

* If the funding is Federal, it must be direct to UI in order to request the Early Setup
* Compliance – holds up early set up when this is not completed
* Budget by category – needs to be accurate
* Signatures – make sure you have all the signatures
* Email to postaward@uidaho.edu
* Compliance question – DGA never able to answer and PI always answers yes completed – can leave that blank PA will double check and work with ORA.
* OSP will email PI and DGA if unable to setup right award and reason for hold up.

**ARGOS Report - Vicki**

* May run an ARGOS report by FOATEXT line item: Finance.Production.Wendy.foatext\_text\_line.

 **December meeting** **- Vicki**

* BINGO – everyone please bring your favorite treats!

**Survey results** **– Ann-Marie**

* Thank you to everyone who participated in the survey – we had 18 responses and some great feedback!
* One of the questions helped to clarify for the committee that everyone still wants to have the meeting monthly. A second related question confirmed that for those months you are unable to attend, a clear majority of you still reviewed the minutes and made use of the emailed resources.
* Through the survey, the DGA RT Committee now has a new list of topics that you have asked us to cover. We will meet to prioritize topics and look for ways to incorporate these topics into the agendas for the 2020 DGA Roundtable meetings.