RE: DGA Roundtable Agenda

March 3, 2022 1:30- 2:45 pm via zoom

Zoom Join form PC, Mac Linux. iOS or Android <https://uidaho.zoom.us/j/86028305542>

Meeting ID: 860 2830 5542   
Passcode: 2145

**See calendar invite for additional details on zoom access, including call-in information.**

***Reminder: Zoom meeting protocol –***

*Please keep your microphones muted during the presentation and wait until the end for questions unless the presenter has indicated otherwise.*

*During the DGA Roundtable Discussion portion of the meeting, please wait for the person currently speaking to finish before asking any questions.*

*You can use the ‘raise hand’ function or you may also put your questions on chat.*

*Thank you all for all that you do!*

**Announcements –**

Sarah Martonick –

Changes to DGA Roundtable – to be held quarterly, with hosting rotating between the OSP Units. March meeting was hosted by OSP-Web (Heather Nelson and Blair) and Post/pre-award (Sponsored Operations) and focused on VERAS and Argos.

New OSP Staff and CSPA program - if you have any process manuals, training videos, training or process documents for any DGA, Financial Technician, Department Manager, or similar role, please email to [smartonick@uidaho.edu](mailto:smartonick@uidaho.edu) for use in creation of the University-wide training manual for financial/administrative functions that will be housed in the FIG Teams Channel OneNote.

**Content – Heather Nelson and Blair Ehlert**

* VERAS:
  + Movement of reports in Argos (announcement emailed to DGA List the week of 2/21/22)

Report names:

* + - Grant Budget Status Summary by Grant – Total funds available by primary expense code as of today (does not include unposted expenses) for the overall grant code (pdf).
    - Grant Budget Status Summary by Fund – Same as above, but broken out by fund/index if there are multiple funds and indexes associated with the grant code (pdf).
    - Grant Budget Status Detail – CSV file of total budget by primary expense code (e.g. 30) and total expenses by expense code (e.g. E5724).

**New location**: Finance/Production/Departmental Financial Reporting

* + Demo the new ‘award setup’ report from Argos:
    - Finance.Production.Departmental Financial Reporting.Award Detail

DGAs can run this report in Argos for all existing projects, and OSP is considering sending this at the accounting setup stage as well.

* + Demonstration of new prior approval request form

VERAS demo via share-screen. Will go live soon.

* + Feedback session for VERAS as a whole (questions we can answer, suggestions, pain points, etc.)

No feedback received.

**General Questions/Concerns: as time allows**

Future Roundtable topics:

Chrome River and E-Code issues for CAU meeting hosted

Cost share management for CAU meeting

Other information:

Kallie asked about the ability to see sponsor name on the homepage for DGAs and Blair walked through the ‘find a project’ area and filters.

Jennifer Meekhof noted the homepage tasks and ability to filter/sort by task and form type here.

Theresa A indicated PI Training is needed. Discussion of mandatory new PI training and potential training for those PIs that don’t properly manage their grants under policy requirements. Potentially called ‘refresher’ training.

Perhaps we start with concept videos.