DGA Roundtable Agenda – **Thursday, June 8, 2017 1:30 – 2:30 pm, IRIC 305 (above the Atrium)**

Call-in Number: Zoom – See Calendar Invite for details. Password for computer/smartphone access is ‘DGA’.

1. OSP Updates and Zoom greetings:

Welcome Jason Oliver, Associate Contract Review Officer: 885-0136, [oliver@uidaho.edu](mailto:oliver@uidaho.edu);

Kay Dee in Pocatello – same #, same email.

1. How to do a Change Order on the PO. – Tami Noble

See attached slides.

1. How to issue a PO in BANNER and how to track it. – John Grimes

See attached slides.

1. Lobbying – Ann-Marie: Postponed until the next meeting due to time shortage.
2. Other items:
   1. Internal UI proposals – who to talk to, what are the rules, where to do they originate?: Next Meeting.
   2. Simplified Subrecipient Commitment forms: See attached. List of who can use:
      1. WSU
      2. ISU
      3. BSU
      4. OSU
      5. NNU
3. As a side note, any subawards to institutions that are members of the FDP Expanded Clearing house do not require a commitment form, only a letter of support and project specific certifications as needed!  A list of those institutions can be found here:   <http://sites.nationalacademies.org/PGA/fdp/PGA_171520>
4. Chart of accounts changes discussion with Heather Nelson:
   * 1. Do we move the detail to the old chart with a map or move it to new chart with detail. The rest of UI is leave in Chart 9 – can move monthly totals to Chart V.
     2. When do you go into Banner and look at FRIGITD to drill into transaction detail, as opposed to running a report?
        1. FRIGITD and as far back as they can go = consensus.
        2. DGAs would have access to both charts but would have to look in both places and/or run a report. Essentially two accesses or pull detail.
   1. Can we have an Argos training? Christian uses Argos to receive data feeds – Ron built it for her to run that way. And/or an ‘Argos for Dummies’ manual? Joe could do this-OSP will ask.
      1. Tip from Cathy – black box on lower left are ‘limitors’ – if you are trying to get all D4s – you have to find the limiter by ‘fund’ and that shows parameter.
   2. If the missing Banner screens causes extra work, email Ron Town to request that the UI brings them back or puts the reports into Argos.
   3. Any FW report might go away – make a list of those that you use so that we can try to ensure that they don’t go away. E.g. FWRITEM, FWRSUMR. Will be in a separate system. Reason: The cloud does not allow customization.