

0:0:0.0 --> 0:0:0.380

Robertson, Beverly

Just ask.

0:0:0.390 --> 0:0:5.420

Robertson, Beverly

It looks like most people already are, but if you haven't, could you just please mute yourself for today's session?

0:0:5.430 --> 0:0:10.630

Robertson, Beverly

If you have questions through the session, just drop them in the chat.

0:0:10.640 --> 0:0:16.470

Robertson, Beverly

We'll be monitoring those and also addressing questions at the end.

0:0:16.480 --> 0:0:19.40

Robertson, Beverly

We'll have, you know, some time allotted for questions.

0:0:19.50 --> 0:0:27.950

Robertson, Beverly

So you can use the hand raise feature if you did have a question live that you wanted to address, but we'll, you know, be sure and cover questions today and make time available.

0:0:28.420 --> 0:0:48.910

Robertson, Beverly

So what we're going to talk about today, we just have start off with some general announcements from both our office as well as from Mike Farina who's the associate controller in you know the business and Finance division and that he oversees the Grants, Accounting Office.

0:0:48.920 --> 0:1:6.450

Robertson, Beverly

So announcements from both sides and then I'll talk a little bit about summer salary for a faculty 9 month faculty and grad students, and how we're addressing that this summer with the change in structure of terms.

0:1:7.250 --> 0:1:15.280

Robertson, Beverly

And then Katie Johnson, in our office and sponsored programs will go over and this is the, this is the the main part of the session today.

0:1:15.290 --> 0:1:28.530

Robertson, Beverly

She'll be talking about and demoing some on demand training videos that she has begun producing based on the the the outcome of the survey.

0:1:28.540 --> 0:1:37.490

Robertson, Beverly

If you remember back in the fall, we conducted a survey of what people wanted to see for grants, training and what you know what sensually, what people struggle with.

0:1:37.500 --> 0:1:50.470

Robertson, Beverly

So she was able to prioritize from both the the staff side and the faculty side what people would like to see most, and has begun recording some short on demand videos and making those available.

0:1:50.480 --> 0:1:55.730

Robertson, Beverly

So she'll go over those today and let's see.

0:1:55.800 --> 0:1:58.430

Robertson, Beverly

Let me I think that's it for the agenda.

0:1:58.440 --> 0:2:4.310

Robertson, Beverly

I'll turn it over first to Lori, our director, Lori Burchard, for announcements from our office.

0:2:9.320 --> 0:2:10.170

Burchard, Lori

Hello everyone.

0:2:10.620 --> 0:2:20.130

Burchard, Lori

So for those who don't know, me and Lori Burchard, director of sponsored programs and I know Bev said, she's going to talk a little bit about summer appointments.

0:2:20.140 --> 0:2:21.330

Burchard, Lori

It's definitely time.

0:2:21.260 --> 0:2:21.670

Kopunovitz, Alice

Of.

0:2:24.300 --> 0:2:24.760

Kopunovitz, Alice

No, that's.

0:2:28.890 --> 0:2:30.790

Kopunovitz, Alice

It's that that.

0:2:21.340 --> 0:2:40.70

Burchard, Lori

I know everyone's starting to look forward and think about that and processing those early is always good, but at the same time as we're wrapping up the academic year and the spring semester also a good time to make sure that records and charges for grants have been made for the academic year as well.

0:2:40.80 --> 0:2:42.730

Burchard, Lori

So just reviewing indexes.

0:2:44.160 --> 0:3:10.120

Burchard, Lori

And financial activity to make sure, especially if faculty members had academic year time, that those salary distribution revisions were done to charge that that graduate assistants have been charged to the correct source so that we're capturing all of those to wrap up activity for this academic year before we or as we start to move into the summer term.

0:3:11.230 --> 0:3:12.480

Burchard, Lori

So keep that in mind.

0:3:12.490 --> 0:3:21.330

Burchard, Lori

Good time to review as we're switching and I will turn it back over to Bev then to get into some of those future looking uh activities. Thanks.

0:3:22.340 --> 0:3:30.110

Robertson, Beverly

Well, I'm going to turn it over next actually to MM Farina associate controller Mike has some things to share as well from his office.

0:3:32.400 --> 0:3:32.990

Farina, Michael

Hello.

0:3:33.560 --> 0:3:37.690

Farina, Michael

It's hard to believe, but we only have two more months left in the fiscal year.

0:3:37.700 --> 0:3:44.420

Farina, Michael

So in preparation for that, I believe some memos will be going out with some key dates here soon.

0:3:45.300 --> 0:3:55.90

Farina, Michael

But we're gonna do something that we've been doing the past few years, but I'm just trying to announce it and plug it as many times as I can on May 2nd.

0:3:55.560 --> 0:4:2.10

Farina, Michael

We're gonna be holding a live banner finance training as it relates to fiscal year end.

0:4:2.20 --> 0:4:3.740

Farina, Michael

So we're going to go over key deadlines.

0:4:5.10 --> 0:4:20.780

Farina, Michael

Some reports that that should be checked before we get too close to the fiscal year, and because some of these processing deadlines are before June 30th, so that this is a good opportunity to kind of see the things that we're looking for.

0:4:20.970 --> 0:4:34.470

Farina, Michael

Some of the things that you should be looking for, and it's an opportunity to ask us any questions that you might have, another quick announcement is that if your department was due for a physical.

0:4:36.140 --> 0:4:39.130

Farina, Michael

Capital inventory report those reports have been sent out.

0:4:41.720 --> 0:4:44.900

Farina, Michael

So if you have any questions on that, feel free to reach out and let me know.

0:4:44.910 --> 0:4:45.970

Farina, Michael

We'll get you squared away.

0:4:47.200 --> 0:4:49.660

Farina, Michael

And then also just the heads up that.

0:4:51.390 --> 0:4:56.960

Farina, Michael

Sometime soon, the effort certification reports for fall of 23 will be sent out.

0:4:57.410 --> 0:4:59.570

Farina, Michael

So I'm gonna throw it back to Bev.

0:5:0.640 --> 0:5:5.610

Robertson, Beverly

Mike, there was one question that popped up in the chat about your session.

0:5:5.620 --> 0:5:7.170

Robertson, Beverly

Well, the training session be recorded.

0:5:8.10 --> 0:5:8.160

Farina, Michael

Yes.

0:5:9.250 --> 0:5:9.520

Farina, Michael

Yeah.

0:5:9.530 --> 0:5:15.820

Farina, Michael

We typically will record that and then at some point it will post it to the controller's office website.

0:5:17.330 --> 0:5:17.970

Robertson, Beverly

OK, great.

0:5:17.460 --> 0:5:29.800

Farina, Michael

There's there's a link for the for the training on the bass forum channel or or the BAS Forum team, but if you have any questions or need any or have any requests for that, please let me know.

0:5:31.750 --> 0:5:32.240

Robertson, Beverly

Thanks Mike.

0:5:32.890 --> 0:5:33.100

Farina, Michael

Sir.

0:5:34.830 --> 0:5:47.500

Robertson, Beverly

So let's talk a little bit about summer terms and grant funded appointments through the summer for 9 month faculty and and graduate assistance.

0:5:47.510 --> 0:6:3.120

Robertson, Beverly

And for those of you have been around a while, you probably remember and have received yearly a notice that we email out just with some information on completing summer appointments, which are done via the epath process.

0:6:3.130 --> 0:6:7.70

Robertson, Beverly

The electronic personal action umm form, which is a workflow.

0:6:7.680 --> 0:6:22.590

Robertson, Beverly

So this year we were, we were surprised frankly to see information that was distributed by academic personnel that that showed a pretty radical change in the structure of summer terms.

0:6:22.720 --> 0:6:37.490

Robertson, Beverly

And I'm saying that just to say, you know, we know we know about as much about it as as anybody else and our our charge would was to take that new structure and let me see if I can share my screen here.

0:6:37.500 --> 0:6:38.730

Robertson, Beverly

I have that open.

0:6:38.820 --> 0:6:47.160

Robertson, Beverly

I'm not sure if everybody received it like find it here, that new structure and.

0:6:48.530 --> 0:7:4.180

Robertson, Beverly

Have a calculation sheet and information for folks on how to calculate summer grant effort as it relates to the the new structure of summer terms.

0:7:4.530 --> 0:7:5.770

Robertson, Beverly

So I'll drop this.

0:7:5.820 --> 0:7:9.170

Robertson, Beverly

I'll drop this in the chat in a bit here too, so people have that.

0:7:9.180 --> 0:7:31.10

Robertson, Beverly

I know it's probably kind of small to see and Long story short, the new structure for teaching for faculty for summer encompasses 12 weeks, even though you know for tenure track and non tenure track faculty the non contract period encompasses 13 weeks.

0:7:31.740 --> 0:7:35.790

Robertson, Beverly

So what that meant to us is we needed clarification.

0:7:35.800 --> 0:7:52.100

Robertson, Beverly

And Laurie and I, you know, were involved in discussions with the Provost Office and curriculum services to clarify what what time span really in their minds could be accommodating grant activity.

0:7:52.110 --> 0:8:5.700

Robertson, Beverly

And really, 12 weeks is 4 teaching 12 credit hours maximum for four tenure track and 15 credits maximum for non tenure track and they're left.

0:8:5.710 --> 0:8:6.440

Robertson, Beverly

I don't know.

0:8:6.550 --> 0:8:21.120

Robertson, Beverly

I think A3 a couple three days before that, 12 weeks and a couple, three day, a couple days after, perhaps that accommodated another week that that adds up to the 13 weeks that can be used for grant activity.

0:8:21.580 --> 0:8:26.150

Robertson, Beverly

Now all the old rules still apply, or regulations apply to grant work.

0:8:26.480 --> 0:8:27.110

Robertson, Beverly

It has to.

0:8:27.120 --> 0:8:28.390

Robertson, Beverly

It should be budgeted.

0:8:28.480 --> 0:8:33.110

Robertson, Beverly

It should be within the grant period, which is always, you know, a sticking point for people.

0:8:33.120 --> 0:8:40.870

Robertson, Beverly

Grants start and end at various times during the year, so you could have a grant that ends you know, July 31st.

0:8:40.880 --> 0:8:44.520

Robertson, Beverly

Well, that would mean that grant activity can't occur past that date.

0:8:44.530 --> 0:8:47.900

Robertson, Beverly

You know, that kind of thing you need to have money available to pay for.

0:8:49.500 --> 0:8:56.410

Robertson, Beverly

The activity and the calculations sheet that we provide and let me see if I can drop this in the chat.

0:8:56.420 --> 0:8:59.150

Robertson, Beverly

This is the email that I had sent out.

0:8:59.160 --> 0:9:1.310

Robertson, Beverly

Oh, probably about a week and 1/2 ago.

0:9:1.460 --> 0:9:3.200

Robertson, Beverly

That includes all this information.

0:9:4.410 --> 0:9:35.480

Robertson, Beverly

The calculation sheet that we have provided for tenure track helps you figure out what you know, factoring in both teaching, which again is can be up to 12 credit hours for tenure track faculty, and it's calculated on a per credit hour basis, whereas grant activity is calculated based on actual time using the previous academic year salary as the basis.

0:9:35.490 --> 0:9:53.350

Robertson, Beverly

So you know, for someone who has maybe a, you know, for example a \$75,000 base salary for academic year 2324, you know which we finishing up now $\$75,000 / 39 = 1$ week's worth of effort.

0:9:53.700 --> 0:9:59.610

Robertson, Beverly

So if they have a week's grant effort budgeted, that would be how it's calculated.

0:9:59.840 --> 0:10:20.390

Robertson, Beverly

Now you know, we do understand it's very confusing and we're happy to help and part of what I include in the documentation that I just dropped in the chat is we're happy to look at any E paths that are prepared, you know, by departmental personnel before they're submitted.

0:10:20.400 --> 0:10:28.650

Robertson, Beverly

We just ask you, give us a couple three days to look them over, you know, just to kind of work them into our regular workload, but we're happy to look at them before they're submitted.

0:10:29.480 --> 0:10:36.820

Robertson, Beverly

There's a lot of information and attachments in the email that I sent out that I just dropped in the chat that, you know, helps clarify.

0:10:36.830 --> 0:10:44.550

Robertson, Beverly

So we do strongly encourage, you know, you spend some time reading through that, especially if you're new to the epath process.

0:10:45.280 --> 0:10:52.840

Robertson, Beverly

And if you're not new to the process, really the again, the big change this summer is the restructuring of the summer terms.

0:10:52.850 --> 0:10:54.480

Robertson, Beverly

There are several of them.

0:10:54.730 --> 0:11:1.380

Robertson, Beverly

Rather than, you know, there is no more intersession summer 123, there are several terms that encompass the 12 weeks for teaching.

0:11:1.620 --> 0:11:12.60

Robertson, Beverly

However, Grant work can encompass 13 weeks, so the the calculation sheet that's an Excel spreadsheet that's included in that email will help you figure that out.

0:11:12.70 --> 0:11:14.880

Robertson, Beverly

And again, we're happy to help you know.

0:11:14.890 --> 0:11:22.410

Robertson, Beverly

Help help you figure work through the the numbers and and make sure all the bases are covered before any kind of grant activity.

0:11:22.780 --> 0:11:25.490

Robertson, Beverly

Empaths are submitted, so I don't know.

0:11:25.500 --> 0:11:27.360

Robertson, Beverly

Lori, did you have any more to add to that?

0:11:28.800 --> 0:11:37.420

Burchard, Lori

I do not, although there's a there's a note in the chat that nothing has shown up in there as far as the attachment.

0:11:36.570 --> 0:11:40.110

Robertson, Beverly

No, that I have to click the little arrow.

0:11:40.120 --> 0:11:40.490

Robertson, Beverly

There I go.

0:11:41.110 --> 0:11:41.520

Burchard, Lori

OK.

0:11:41.700 --> 0:11:42.580

Robertson, Beverly

There that should be there.

0:11:41.580 --> 0:11:49.340

Burchard, Lori

And I guess so I I will maybe just add that in terms of this in some ways the sessions have become more complex than that.

0:11:49.350 --> 0:12:1.920

Burchard, Lori

There are more options now and overlapping, and it's not kind of the clarity where everything used to be somewhere 1/2 and three, but in some ways there's a bit of a in some ways.

0:12:1.930 --> 0:12:16.50

Burchard, Lori

Maybe it's a more simplified because it's more taking a holistic look at that total of 12 credits over the whole 12 weeks open to teaching as opposed to as much parsing out between one session versus another.

0:12:16.420 --> 0:12:21.990

Burchard, Lori

So umm and that should be clear from the calculation sheet as well.

0:12:23.140 --> 0:12:28.810

Robertson, Beverly

And I will say, you know, in the in the attachment that I draw just dropped in chat.

0:12:28.820 --> 0:12:32.380

Robertson, Beverly

And thanks for reminding me of for forgot to click the little arrow so it should be there.

0:12:32.390 --> 0:12:35.530

Robertson, Beverly

Now the calculation sheet is for tenure track.

0:12:35.600 --> 0:12:42.590

Robertson, Beverly

If you do have NTFS, who will be earning grant paid activity through the summer?

0:12:42.840 --> 0:12:45.200

Robertson, Beverly

We have a separate calculation sheet.

0:12:45.210 --> 0:13:0.580

Robertson, Beverly

We don't really share that publicly, but you can just contact me and we will help you work through that in TTS are paid using a different structure for their teaching activity.

0:13:0.650 --> 0:13:11.420

Robertson, Beverly

It's based on a per credit hour amount per in in their rank with their rank is whether they're a lecturer, assistant professor or on a so we can help you calculate that.

0:13:11.430 --> 0:13:14.360

Robertson, Beverly

So just contact me if you do have NTFS and you want help with that.

0:13:14.370 --> 0:13:17.210

Robertson, Beverly

We have a sheet that that will, you know, cover that.

0:13:18.620 --> 0:13:19.150

Robertson, Beverly

OK.

0:13:19.160 --> 0:13:21.150

Robertson, Beverly

Well, let's move on.

0:13:21.160 --> 0:13:23.610

Robertson, Beverly

I'll turn it over to Katie Johnson and our office.

0:13:23.620 --> 0:13:32.940

Robertson, Beverly

Who's gonna talk about what she's been doing with developing training videos and just sharing some samples?

0:13:43.350 --> 0:13:43.880

Johnson, Katie

All right.

0:13:44.180 --> 0:13:44.800

Johnson, Katie

Sorry about that.

0:13:44.810 --> 0:13:53.200

Johnson, Katie

I wanted to make sure I turned on audio, so I just wanna go back and remind you from the survey that this was the takeaway that I'm using.

0:13:53.210 --> 0:13:55.780

Johnson, Katie

Banner Nine was the number one priority for staff.

0:13:55.990 --> 0:13:58.910

Johnson, Katie

I think a lot of times that's because Banner 9 seems a little opaque.

0:13:58.920 --> 0:14:8.720

Johnson, Katie

You don't know what's out there until you actually start working with it, and grants accounting does have some videos up on this, and we'll probably be putting forward more education videos.

0:14:8.970 --> 0:14:21.630

Johnson, Katie

But what I've really taken the lead on is the number one priority for faculty and how to review expenditures so that come up with a couple of videos and we have posted them on our web page.

0:14:21.640 --> 0:14:29.900

Johnson, Katie

At least the first one, the labor distribution is yet to be posted, so to find these you can go to the office of Sponsored Programs.

0:14:29.940 --> 0:14:31.840

Johnson, Katie

You're gonna wanna look under award management.

0:14:33.680 --> 0:14:37.900

Johnson, Katie

And scroll all the way down to the bottom and you will see that we have posted videos.

0:14:39.260 --> 0:14:44.730

Johnson, Katie

So the first video is a walk through on how to pull a Ledger report.

0:14:44.740 --> 0:14:46.970

Johnson, Katie

It's about 5 minutes.

0:14:46.980 --> 0:14:54.10

Johnson, Katie

Little little bit longer than 5 minutes, so that gives you a really detailed how to get to it and then below that is just a quick reference.

0:14:54.20 --> 0:15:0.110

Johnson, Katie

So if it's been as a faculty member six months, nine months and you're trying to go back and remember, how did I do that?

0:15:0.220 --> 0:15:1.690

Johnson, Katie

You don't want to watch the whole video.

0:15:1.700 --> 0:15:6.580

Johnson, Katie

There's just the short 1 1/2 minute video reminding you how to do it and how to pull it into Excel.

0:15:7.630 --> 0:15:17.380

Johnson, Katie

So today, just to give you an idea, I know that we have a lot of staff on here and a few faculty I wanted to go ahead and play both of these videos for you.

0:15:17.390 --> 0:15:26.840

Johnson, Katie

So you kind of get a feel of the content, what's in them and if somebody reaches out to you with a question, maybe that question is answered in this video and you can direct them to it.

0:15:26.950 --> 0:15:31.130

Johnson, Katie

And it also to give you a heads up of what what it's going to look like moving forward.

0:15:32.120 --> 0:15:33.800

Johnson, Katie

So the first one is the Ledger report.

0:15:40.940 --> 0:15:43.660

Johnson, Katie

And let me know if you don't have the auto l audio.

0:15:43.670 --> 0:15:46.270

Johnson, Katie

I have turned it on but just let me know if there's a problem with it.

0:15:49.0 --> 0:15:52.840

Johnson, Katie

This is a quick tutorial on how to pull a Ledger report using flashline.

0:15:53.520 --> 0:16:8.630

Johnson, Katie

The Ledger report is a helpful tool to quickly access an overview of currently approved

budget categories, processed expenditures and commitments as of 1 business day prior to the date the report is pulled to access this information, you will need to sign into your flashline account.

0:16:8.640 --> 0:16:12.780

Johnson, Katie

If you are off campus, you will first need to sign into the current VPN service.

0:16:14.790 --> 0:16:20.160

Johnson, Katie

Once you are in Flashline, navigate to the employee section on the vertical navigation bar.

0:16:20.530 --> 0:16:23.990

Johnson, Katie

Scroll to the finance reports found in reports Cognos.

0:16:26.660 --> 0:16:29.620

Johnson, Katie

Next, click on Grant report by principal investigator.

0:16:31.780 --> 0:16:39.440

Johnson, Katie

This will pull a listing of all Pis at Kent State University who have managed to grant an alphabetical order to find the Pi.

0:16:39.450 --> 0:16:40.430

Johnson, Katie

You are interested.

0:16:40.520 --> 0:16:47.90

Johnson, Katie

Scroll down until you find their name to select them, click on the empty box until you see a check mark.

0:16:47.740 --> 0:16:57.650

Johnson, Katie

You can select more than one Pi at a time, but I suggest you only do one or two as the next screen can get confusing with multiple Pis information displayed together.

0:16:58.220 --> 0:16:59.970

Johnson, Katie

To deselect, just click on Megan.

0:17:1.630 --> 0:17:5.560

Johnson, Katie

To run the report, scroll to the bottom of the web page and click the finish button.

0:17:7.180 --> 0:17:9.950

Johnson, Katie

This may take a minute, but it will pull the following screen.

0:17:11.260 --> 0:17:17.670

Johnson, Katie

Here you can see the principal investigators name the grant ID, whether it is active or inactive.

0:17:18.40 --> 0:17:23.350

Johnson, Katie

If it is cost, share or grant associated with one grant ID and the fund number.

0:17:24.180 --> 0:17:30.500

Johnson, Katie

Please note that the fund number or any blue number moving forward will typically take you to more information.

0:17:31.780 --> 0:17:35.250

Johnson, Katie

We'll click on the fund number to pull the Ledger report for this last grant.

0:17:36.350 --> 0:17:46.270

Johnson, Katie

This is now the Grant Ledger report, the top of the page will list the full grant number, the grant ID, fund organization and program number.

0:17:47.650 --> 0:17:52.170

Johnson, Katie

It will list an abbreviated title, responsible organization and program type.

0:17:52.980 --> 0:18:1.440

Johnson, Katie

Below this you will find that principal investigator grant accountant current approved project period and whether the grant is active or inactive.

0:18:2.770 --> 0:18:13.40

Johnson, Katie

The first section below this titled salary and Wages will list expenditures per category, but will not provide the names of the people working on the project to access that information.

0:18:13.50 --> 0:18:15.280

Johnson, Katie

You will need to pull a labor distribution report.

0:18:16.890 --> 0:18:21.380

Johnson, Katie

Additionally, this first screen that comes up may not be the entire report.

0:18:21.690 --> 0:18:27.400

Johnson, Katie

If you scroll to the bottom of the page and you do not see a summary line, then you are not seeing the full report.

0:18:28.610 --> 0:18:32.520

Johnson, Katie

The page navigation buttons are at the bottom of the web page and the left corner.

0:18:33.110 --> 0:18:37.860

Johnson, Katie

You may need to Scroll down multiple pages or you can click the bottom button.

0:18:39.390 --> 0:18:45.480

Johnson, Katie

This now pulls up the last page of the report and you can scroll to the bottom to find the final summary line.

0:18:46.190 --> 0:18:54.380

Johnson, Katie

This list, the total award total expenditures today and has a zeroed out remaining balance since the grant is no longer active.

0:18:54.910 --> 0:18:59.850

Johnson, Katie

If this was still an active grant, this would be where your remaining estimated balance would be displayed.

0:19:1.590 --> 0:19:6.150

Johnson, Katie

Another useful function of this report is that you can see details for most account lines.

0:19:7.430 --> 0:19:14.50

Johnson, Katie

There are several lines that are pool lines as indicated in their title, travel pool supply pool are examples.

0:19:15.270 --> 0:19:19.520

Johnson, Katie

These are only used as budgeting categories and should not have costs applied to them.

0:19:20.130 --> 0:19:24.100

Johnson, Katie

Associated Subaccount codes will be used to post expenditures.

0:19:24.690 --> 0:19:33.820

Johnson, Katie

For example, under supplies pool, this grant has had a research, supplies, equipment and furniture less than 5000 and computer software licenses applied to it.

0:19:35.30 --> 0:19:41.210

Johnson, Katie

If you would like to review individual charges in one of these lines, you can click on the Blue Account code.

0:19:41.380 --> 0:19:47.970

Johnson, Katie

If you accidentally click on the pool line and the next screen does not pull up any information, it's OK, just close the tab.

0:19:47.980 --> 0:19:50.290

Johnson, Katie

Come back here and click on the one below it.

0:19:50.920 --> 0:19:55.850

Johnson, Katie

This will take you to a detailed transaction history report for research supplies.

0:19:56.60 --> 0:19:58.230

Johnson, Katie

This is likely multiple pages long.

0:19:58.460 --> 0:20:5.880

Johnson, Katie

Reading the Ledger report or a detailed report such as this in flash line can be cumbersome as it is spread across multiple pages.

0:20:5.940 --> 0:20:10.150

Johnson, Katie

This is a much better way to view the data is to pull it into Excel.

0:20:10.720 --> 0:20:17.310

Johnson, Katie

To do this from either screen, click on the Blue Play button and select Run Excel.

0:20:17.600 --> 0:20:21.20

Johnson, Katie

You can also run a PDF and Excel file is much more useful.

0:20:21.460 --> 0:20:25.10

Johnson, Katie

It will generate an Excel file for the report displayed on your screen.

0:20:25.300 --> 0:20:34.730

Johnson, Katie

Once your Excel file is open, you will be able to quickly run sums by budget, category or apply filters and searches to long detailed reports.

0:20:36.490 --> 0:20:41.900

Johnson, Katie

This concludes the presentation on how to access a grant Ledger report and how to pull it into Excel.

0:20:42.300 --> 0:20:52.990

Johnson, Katie

There are additional resources and videos available on other grant management topics provided by research and economic development, sponsored programs and grants accounting a unit of the controller's office.

0:20:55.90 --> 0:20:55.550

Johnson, Katie

Thank you.

0:20:59.220 --> 0:20:59.670

Johnson, Katie

All right.

0:20:59.680 --> 0:21:2.70

Johnson, Katie

So that one was about 5 minutes long.

0:21:2.80 --> 0:21:12.770

Johnson, Katie

The Labor distribution report, which will have some repetitive information in it, but I needed to have it there, not knowing who would be accessing these and how much information they had walking into it.

0:21:13.60 --> 0:21:18.980

Johnson, Katie

So as I referenced earlier, the salary and wages doesn't tell you who has been applied to that account.

0:21:18.990 --> 0:21:33.260

Johnson, Katie

So if you have multiple project directors, faculty members who are taking summer salary, you're not going to be able to tell you know, if all three of them have a pay date on the same date, it's going to give you a lump sum paid to summer salary.

0:21:33.310 --> 0:21:43.640

Johnson, Katie

If you want to be able to tell you know Pi one was paid \$3000, Pi two was paid 2500 and PI3 was paid \$800.00 you're going to have to pull Labor distribution report.

0:21:43.910 --> 0:21:52.290

Johnson, Katie

So here's the video on that this hasn't been posted yet, and I found a small error in it that I'm going to correct before it gets posted, but this is a working demo.

0:21:58.130 --> 0:22:0.650

Johnson, Katie

Pull a labor distribution report using flashline.

0:22:5.730 --> 0:22:5.880

Robertson, Beverly

Yes.

0:22:1.840 --> 0:22:8.80

Johnson, Katie

Can you hear that report is useful to review detailed salary and associated benefits applied for each?

0:22:8.120 --> 0:22:13.690

Johnson, Katie

It is very quiet except for graduate student health insurance, which appears on the Grant Ledger report.

0:22:14.660 --> 0:22:18.290

Johnson, Katie

To access this information you will need to sign into your flashline account.

0:22:18.560 --> 0:22:22.520

Johnson, Katie

If you're off campus, you will first need to sign in to the current VPN service.

0:22:23.500 --> 0:22:27.870

Johnson, Katie

Once you're signed into your Flashline account, navigate to the employee setting.

0:22:28.300 --> 0:22:32.170

Johnson, Katie

Scroll down until you see finance reports under report Cognos.

0:22:33.410 --> 0:22:35.990

Johnson, Katie

Click on this and locate labor distribution.

0:22:38.430 --> 0:22:44.980

Johnson, Katie

To run a report, the following three parameters need to be filled in the grant index number, which always starts with a four.

0:22:47.510 --> 0:22:56.120

Johnson, Katie

If you're looking for the cost share associated with a grant, replace the four with a capital C you'll need to select the fiscal year you're interested in.

0:22:57.740 --> 0:23:2.160

Johnson, Katie

This is the university fiscal year as well as the fiscal period.

0:23:2.720 --> 0:23:7.550

Johnson, Katie

I recommend you always select the last selection 12 June.

0:23:8.0 --> 0:23:11.650

Johnson, Katie

This will show all expenditures for the entire fiscal year to date.

0:23:12.460 --> 0:23:19.810

Johnson, Katie

If you select one of the other months, you may not see everything that has posted to run the query, click the finish button at the bottom of the web page.

0:23:21.700 --> 0:23:29.280

Johnson, Katie

For privacy reasons, I'm going to continue this demonstration outside of the live flashlight, removing employee names and banner IDs.

0:23:30.700 --> 0:23:40.290

Johnson, Katie

This is an example of what will typically show on the next page after clicking finish to see the Labor distribution report, click on the Blue Index number.

0:23:41.180 --> 0:23:46.760

Johnson, Katie

From this point forward, blue underlying text will typically take you to more detailed information.

0:23:47.900 --> 0:23:52.390

Johnson, Katie

If you see a screen like this, it indicates that no labor or benefit expenses exist.

0:23:52.490 --> 0:23:53.710

Johnson, Katie

Based on your query setting.

0:23:57.270 --> 0:24:6.140

Johnson, Katie

If labor and benefits have been applied, you will see something like this on the next screen after clicking on the Blue Index number, we are now viewing the labor distribution report.

0:24:7.120 --> 0:24:17.420

Johnson, Katie

The top of the page will list the full grant number, the grant ID, fund organization and program and abbreviated title, responsible organization and program type.

0:24:18.730 --> 0:24:22.730

Johnson, Katie

The next two lines will display the parameters that were used to pull this report.

0:24:22.770 --> 0:24:31.110

Johnson, Katie

Here fiscal year 2022 and month 12 June, the first screen that comes up may not be the entire report.

0:24:31.370 --> 0:24:39.670

Johnson, Katie

If you see navigation buttons in the bottom left corner of the web page indicates that the full data set is not shown and that you will need to page down to see everything.

0:24:40.570 --> 0:24:45.290

Johnson, Katie

If I click on the blue Pi PD name, we will be directed to additional details.

0:24:47.140 --> 0:24:56.140

Johnson, Katie

This page displays each individual payment made for summer salary to the Pi PD between July 1st 2021 and June 30th, 2022.

0:24:57.520 --> 0:24:59.130

Johnson, Katie

Let's go back to the main Ledger report.

0:25:0.410 --> 0:25:9.260

Johnson, Katie

If the information you want to view is spread across multiple pages or you would like to manipulate or save the data, you can pull it into an Excel workbook.

0:25:9.730 --> 0:25:14.260

Johnson, Katie

To do this, click on the blue play button in the upper left corner of the screen.

0:25:15.650 --> 0:25:17.450

Johnson, Katie

Next select run Excel.

0:25:20.250 --> 0:25:23.410

Johnson, Katie

The report will pull, but it may take a minute to complete the request.

0:25:25.250 --> 0:25:29.100

Johnson, Katie

You've now opened an Excel workbook that will allow you to make calculations.

0:25:29.150 --> 0:25:32.50

Johnson, Katie

Enter notes and save the information for future use.

0:25:33.380 --> 0:25:38.560

Johnson, Katie

This concludes the presentation on how to access a grant Ledger report and how to pull it into Excel.

0:25:39.430 --> 0:25:54.840

Johnson, Katie

There are additional resources and videos available that will review how to leverage the information provided in this report, as well as other grant management topics provided by research and economic development, sponsored programs and grants accounting a unit of the controller's office.

0:25:54.910 --> 0:25:55.20

Johnson, Katie

Yes.

0:26:0.860 --> 0:26:4.70

Johnson, Katie

So those are just the first two videos that I've come out with.

0:26:4.80 --> 0:26:7.120

Johnson, Katie

There are plans to come out with additional videos.

0:26:7.130 --> 0:26:9.680

Johnson, Katie

As I mentioned at the end of the labor distribution, that will help.

0:26:11.810 --> 0:26:16.630

Johnson, Katie

Actually utilize the information that's in that report how to use it to check summer salary?

0:26:16.640 --> 0:26:18.10

Johnson, Katie

That's actually been paid out.

0:26:18.210 --> 0:26:27.220

Johnson, Katie

And because summer salary is split across the fiscal years, you typically have to pull 2 fiscal reports and then add that information together.

0:26:27.650 --> 0:26:36.420

Johnson, Katie

Also had to check and conferences and calculate as you end or come close to the end of a grant period and you're really trying to figure out how much money you have left to spend.

0:26:36.910 --> 0:26:42.970

Johnson, Katie

Walk you through how to check what the actual remaining encumbrance is to estimate benefits for employees?

0:26:43.540 --> 0:26:44.50

Johnson, Katie

Yeah.

0:26:44.500 --> 0:26:50.150

Johnson, Katie

And some of those more advanced ways to use the information, so that'll be coming out next.

0:26:50.160 --> 0:26:53.230

Johnson, Katie

It'll probably be there's two ways that we can present the information.

0:26:53.240 --> 0:27:7.210

Johnson, Katie

I can either break it up into a bunch of small videos, but I think what I'm going to do is put it in one large video with bookmarks that will be labeled, and if you need to see one specific item, you should be able to go directly to that one part of the video.

0:27:7.400 --> 0:27:8.900

Johnson, Katie

But that's yet to be determined.

0:27:8.910 --> 0:27:14.380

Johnson, Katie

I'm still learning how to use kaltura and what might be reaching out for IT support on that.

0:27:15.360 --> 0:27:23.590

Johnson, Katie

The other video, based on the survey that requested information and training, would be the how to read a spending plan.

0:27:24.20 --> 0:27:44.780

Johnson, Katie

So hopefully in the next couple of weeks I can get those out and the spending plan would be useful both for faculty and for staff, because really, sometimes even though we get them in our emails every time they're changed, sometimes you just you don't reference them as often as probably the information could be helpful to be referenced.

0:27:45.290 --> 0:27:57.540

Johnson, Katie

So having a video reviewing that helping faculty members know what's in there, how to use it when it needs to be changed through budget revision, I think that could help answer a lot of the questions that I saw on the survey.

0:27:58.290 --> 0:28:9.120

Johnson, Katie

So, and if as we're moving through this process, there is a video that you would like to see posted or questions that you would like to see, you know, how can we present this information, feel free to shoot me an email.

0:28:9.470 --> 0:28:9.940

Johnson, Katie

All righty.

0:28:9.950 --> 0:28:12.360

Johnson, Katie

I hope everybody's doing well and I'm gonna hand it back to Bev.

0:28:13.420 --> 0:28:21.230

Robertson, Beverly

Thanks, Katie and I dropped also in the chat a link to the sponsored programs awards management page.

0:28:21.240 --> 0:28:24.590

Robertson, Beverly

And as Katie mentioned, these recordings are toward the bottom.

0:28:24.600 --> 0:28:29.50

Robertson, Beverly

But that page has a lot of great information on it for grants management.

0:28:29.200 --> 0:28:39.830

Robertson, Beverly

We have a set of documents that we call the grants management manual on various topics you know, related to to overseeing grants at Kent State.

0:28:39.840 --> 0:29:17.450

Robertson, Beverly

The factor in both grant regulations that are imposed externally by funders as well as university policy and procedures, so those are good to keep in mind as well, and probably what would be most helpful to us as people view these and as we produce more we'll we'll you know make them known via you know email blasts and occurred to me this morning I probably should have sent info on this session to the bass forum so we will use that that Channel as well to drop information about future videos that we produce but I think what we're.

0:29:17.550 --> 0:29:18.920

Robertson, Beverly

Be most helpful to us.

0:29:19.310 --> 0:29:21.310

Robertson, Beverly

As Katie mentioned, you know it would be twofold.

0:29:21.880 --> 0:29:27.260

Robertson, Beverly

Any topics that you would like to see training videos on it?

0:29:27.270 --> 0:29:45.910

Robertson, Beverly

We'll be doing short ones as well as longer, more in depth, ones that, as Katie said, will be bookmarks in case you just want one piece of information, but also feedback on the ones that are there if things aren't clear or they're aspects of it that you know you know would be more helpful.

0:29:46.140 --> 0:30:1.130

Robertson, Beverly

Just let us know that shoot an email to either me or to Katie and you know we're happy to look into that because the whole point of these is to help the grants community at the university manage grants more effectively.

0:30:1.260 --> 0:30:7.170

Robertson, Beverly

So any information or feedback that people want to shoot our way we would, you know, really appreciate it.

0:30:7.560 --> 0:30:15.230

Robertson, Beverly

So I'm going to turn it back over to Mike Farina and the controller's office to talk about plans they have for videos they'd like to produce.

0:30:19.110 --> 0:30:19.680

Farina, Michael

Alright.

0:30:19.690 --> 0:30:24.370

Farina, Michael

Hello going to share real quick.

0:30:27.620 --> 0:30:30.850

Farina, Michael

So, umm, the controller's office?

0:30:30.860 --> 0:30:34.50

Farina, Michael

We have canned full of some finance training.

0:30:34.60 --> 0:30:47.70

Farina, Michael

They're not really grant specific, but I just wanted to throw it out there while we're on the topic of training, if you go to the controller's office and find the banner finance resources, yeah, that's banner finance resources option.

0:30:50.220 --> 0:31:2.80

Farina, Michael

And here we have some detailed quick guides, some descriptions of the forms, and a handful of videos based on prior trainings we've recorded.

0:31:3.940 --> 0:31:6.660

Farina, Michael

I will drop a link for this site in the chat here.

0:31:7.470 --> 0:31:8.90

Farina, Michael

Umm.

0:31:8.470 --> 0:31:23.430

Farina, Michael

And we also have some other presentations and PowerPoint slides, some with video and then some miscellaneous banner finance aids that most of these are just focused on the financial aspect of them.

0:31:23.440 --> 0:31:32.500

Farina, Michael

They're not like targeted for grants, but we will be working with Katie to kind of figure out what direction to take in some of those.

0:31:32.570 --> 0:31:36.260

Farina, Michael

But for sure, we've been requested.

0:31:36.500 --> 0:31:49.110

Farina, Michael

We're gonna make a training session on or a training video available for capital equipment and more specifically capital equipment builds.

0:31:49.390 --> 0:31:57.960

Farina, Michael

So this would be, you know if you order a bunch of supplies with the intent of building them into a bigger item.

0:31:57.970 --> 0:32:3.80

Farina, Michael

I know in the past we've had some departments build supercomputers out of parts.

0:32:3.90 --> 0:32:6.570

Farina, Michael

It was cheaper to buy the pieces parts and put them together.

0:32:7.280 --> 0:32:10.670

Farina, Michael

Uh, we we do have a process for this.

0:32:10.980 --> 0:32:15.290

Farina, Michael

I just don't know how well it's known out there.

0:32:15.300 --> 0:32:23.660

Farina, Michael

So we, we'd like to get something more official put out there and shared, but again, you know we're always up for suggestions and.

0:32:25.720 --> 0:32:28.130

Farina, Michael

We will definitely take that into consideration.

0:32:31.280 --> 0:32:32.820

Farina, Michael

So, yeah, we're gonna throw it back to Bev.

0:32:34.250 --> 0:32:35.80

Robertson, Beverly

Thanks Mike.

0:32:35.690 --> 0:32:40.60

Robertson, Beverly

Well, I think that pretty well encompasses what we wanted to talk about today.

0:32:40.190 --> 0:32:46.940

Robertson, Beverly

If anyone has any questions they'd like addressed, you know, live before the group.

0:32:47.870 --> 0:32:49.110

Robertson, Beverly

And please do that.

0:32:51.450 --> 0:32:58.910

Robertson, Beverly

Just wait a minute or so, and let's see if people have questions they well, you can eat a drop in in the chat, or you can, you know, raise your hand and we can talk about them live.

0:33:0.700 --> 0:33:12.470

Robertson, Beverly

But I think you know what we want to emphasize is we have a lot of different resources available that are written documentation and now expanding into recordings.

0:33:12.480 --> 0:33:16.910

Robertson, Beverly

And then beyond that, you know you have live people who work in both offices.

0:33:17.140 --> 0:33:24.890

Robertson, Beverly

You can always shoot us an email or call us if you have questions because you know the one thing with grants, things.

0:33:25.370 --> 0:33:27.450

Robertson, Beverly

There are situations that can arise.

0:33:27.460 --> 0:33:38.200

Robertson, Beverly

They're they're unusual, so we're happy to talk through any, you know, anything that comes up that uh, you know you you need to, you need addressed.

0:33:38.670 --> 0:33:41.230

Robertson, Beverly

Lori, you wanna address that question that popped in?

0:33:40.890 --> 0:33:41.460

Burchard, Lori

Sure.

0:33:41.470 --> 0:33:46.640

Burchard, Lori

Yeah, I figure we might as well cover it since it since it was, uh, you know, since we have the time.

0:33:46.730 --> 0:33:48.840

Burchard, Lori

So question was posting the chat.

0:33:48.850 --> 0:33:52.380

Burchard, Lori

Can you clarify policy regarding grant spending and IRB approval?

0:33:53.490 --> 0:33:56.690

Burchard, Lori

Umm, I guess maybe the first answer is that it may depend.

0:33:58.290 --> 0:34:7.400

Burchard, Lori

Upon some different factors, one being the Funding Agency and another being the specifics of the of the project itself.

0:34:7.470 --> 0:34:21.320

Burchard, Lori

So some agencies, such as, maybe most notably NIH, National Institutes of Health, you know, they typically will not issue an award until IRB approval is confirmed.

0:34:21.590 --> 0:34:35.140

Burchard, Lori

And you know that information is submitted to them, so that would probably be the first factor is if the agency requires that before an award, then we certainly would not be able to start spending.

0:34:35.460 --> 0:34:59.30

Burchard, Lori

Now there are, you know, sometimes projects that have delayed onset of human subjects, related pieces and then in that case, NIH, for example may issue an award with an allowability to spend some part of the funds that are used to to the work needed prior to the human subjects work.

0:34:59.200 --> 0:35:4.270

Burchard, Lori

And you know, so that would allow us to set up kind of limited funding on an award.

0:35:5.370 --> 0:35:25.780

Burchard, Lori

Now, when we're talking about an agency, uh, maybe that doesn't have a specific practice as as Nic, we may need to take it more on a case by case basis to look and see what can be, you know, what is allowable and what can be done to be set up before IRB approval.

0:35:25.890 --> 0:35:41.480

Burchard, Lori

And I think just with, you know, our main consideration and that is just making sure that what can be done could be allowed, but without getting into anything that might be considered human subjects related.

0:35:42.880 --> 0:36:4.110

Burchard, Lori

Uh, without approval because we have had some issues with that in the past where, you know, maybe work goes a little bit too far and gets into things that are human subjects related before we have that in approval in place or maybe having the approval but not having the notifications to the Funding Agency of required done so.

0:36:4.170 --> 0:36:6.670

Burchard, Lori

So that's the basics.

0:36:6.680 --> 0:36:22.420

Burchard, Lori

But you know when we get into more specifics, if it's not something that can be approved completely ahead of time, we probably need to look at the specifics of that project and just take that you know that specific instance under under consideration.

0:36:23.270 --> 0:36:32.700

Robertson, Beverly

Lori, I'm sure there are a lot of people on the the call today who have no familiarity with human subjects inclusion and or know what IB means.

0:36:33.270 --> 0:36:33.500

Burchard, Lori

Umm.

0:36:33.150 --> 0:36:41.690

Robertson, Beverly

Could you talk a little bit about what that process is and the the office here that is involved in that and what IRB stands for?

0:36:40.840 --> 0:36:42.840

Burchard, Lori

Sure, I yeah.

0:36:42.850 --> 0:36:59.480

Burchard, Lori

So IRB uh is for the Institutional Review Board and that is specifically for projects that involve human subjects, research and human subjects research may be more broad than if you're not familiar with it may be more broad than you're thinking.

0:36:59.490 --> 0:37:33.10

Burchard, Lori

So there's obviously a clinical studies things that are often done at medical centers or hospitals that not too many of our projects reach, but it also includes lower level studies and even things as simple as a survey or a focus group are likely have some aspect of human subjects research that review process and approval is handled by the Office of Research Compliance, which is also in the division of Research and Economic Development overseen by Kevin McCreary.

0:37:33.420 --> 0:37:38.210

Burchard, Lori

And so I guess that's also outside of our specific expertise.

0:37:38.220 --> 0:37:45.800

Burchard, Lori

We coordinate very closely with them when there are projects that involve that, but umm don't have a real role in the review or the approval.

0:37:45.860 --> 0:37:59.660

Burchard, Lori

So I guess it would say if you're doing something and you're not sure, reach out to Research Compliance or if you're not sure how to find or reach them, reach out to, you know, can certainly reach out to us and we will put you in touch with them.

0:38:0.450 --> 0:38:13.440

Burchard, Lori

Uh, you have probably seen if you've done any proposals that there are questions asking about that in when you're doing the proposal records and you know, so I think we would also advise if it's not clear.

0:38:14.620 --> 0:38:16.600

Burchard, Lori

Umm, you know, it's probably better to.

0:38:18.80 --> 0:38:19.730

Burchard, Lori

Fine to find that out, you know?

0:38:19.740 --> 0:38:28.130

Burchard, Lori

And they have some pretty quick processes for if it's what would be considered an expedited review or an exempt study.

0:38:28.140 --> 0:38:33.110

Burchard, Lori

So something that really doesn't need a full review, but that it's good to have noted.

0:38:33.220 --> 0:38:46.470

Burchard, Lori

So I guess it would say if you're if you're not sure but are working with human human subjects or people in any way, probably better to check it out just to make sure and be safe so that we can make sure we have all of the compliance aspects covered.

0:38:49.30 --> 0:38:49.600

Robertson, Beverly

OK, great.

0:38:49.610 --> 0:38:50.300

Robertson, Beverly

Thanks Lori.

0:38:50.360 --> 0:38:59.730

Robertson, Beverly

I don't see any other questions, so if that's the case, we'll go ahead and sign off and thanks everyone for participating today.

0:38:59.740 --> 0:39:3.470

Robertson, Beverly

We had a pretty big crowd, up to 76 people on so that's terrific.

0:39:3.550 --> 0:39:11.160

Robertson, Beverly

And I will distribute the link for this recording once it's available and again just feel free to reach out to our offices and don't try to.

0:39:11.890 --> 0:39:12.560

Robertson, Beverly

You don't know.

0:39:12.570 --> 0:39:17.160

Robertson, Beverly

Don't try to figure out whether the question should go to the grants Accounting Office or the sponsored programs office.

0:39:17.310 --> 0:39:22.230

Robertson, Beverly

Just contact somebody if you have a question and will will direct you to the correct place if it.

0:39:22.460 --> 0:39:25.990

Robertson, Beverly

For this isn't a question that we, you know, was in our purview.

0:39:26.0 --> 0:39:31.370

Robertson, Beverly

But thanks again for attending today and everyone have a good day and a great rest of the week.

0:39:31.600 --> 0:39:32.120

Robertson, Beverly

Bye everybody.