



RESEARCH ADMINISTRATION DAY (RAD) 2014

Wednesday, May 28, 2014
Edmonton Clinic Health Academy (ECHA)

“Spending Wisely”

Online registration <http://www.learningshop.ualberta.ca/SearchAll.do?searchKey=Research%20@%20the%20UofA>

TIME	PROGRAM AT A GLANCE		
8:00A to 12 noon	INFORMATION BOOTH.....		
8:30A to 8:45A	RAD INTRODUCTION/OPENING REMARKS Room L1-490 Introduction: <i>Lorraine Deydey, Director, Research Services Office</i> Opening Remarks: <i>Dr. Walter Dixon, Associate VP (Research)</i>		
SESSIONS	100 LEVEL (Introductory)	200 LEVEL (Intermediate)	300 LEVEL (Advanced)
9:00A to 10:15A	RAD 101 Room L1-490 <i>Overview of Research Administration at the U of A</i> <small>(for New Research Admin only)</small> <i>Betty Peavey</i>	RAD 201 Room L1-420 <i>Research Reporting</i> <i>Chandra Wanigaratne</i>	RAD 301 Room L1-430 <i>Agency Audits: What are the Auditors Looking For and How to be Prepared for One</i> <i>Lorena Li</i>
10:15A to 10:45A	BREAK.....		
SESSIONS	100 LEVEL (Introductory)	200 LEVEL (Intermediate)	300 LEVEL (Advanced)
10:45A to 12:00A	RAD 102 Room L1-490 <i>Eligible & Ineligible Expenses</i> <i>Pat Jones</i>	RAD 202 Room L1-420 <i>Overview of Grants 3.0</i> <i>Michael Walesiak</i>	RAD 302 Room L1-430 <i>How to Initiate Spending of Research Funds</i> <i>Anna Minarchi</i>





Research Administration Day (RAD) 2014

May 28, 2014

"Spending Wisely"

REGISTRATION / INFORMATION BOOTH / OPENING REMARKS

RAD Registration/Information Booth

Time: 8:00 to 3:00 pm

Room: ECHA L1-490

Description: Light refreshments provided.

Online Registration:

<http://www.learningshop.ualberta.ca/SearchAll.do?searchKey=Research%20@%20the%20UofA>

RAD Opening Remarks

Time: 8:30 to 8:45 am

Room: ECHA L1-490

Presenter: **Dr. Walter Dixon, Associate VP (Research)**

Online Registration:

<http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7420>



Research Administration Day (RAD) 2014

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SESSION DESCRIPTIONS

100 Level Sessions – Introductory

Session ID: RAD 101

Time: 9:00 to 10:15 am

Room: ECHA L1-490

Title: Basics of Research Administration for New Lab Managers and Grant Administrators

Presenter: Betty Peavey, Research Facilitator-Natural Sciences, Research Services Office

Description: This workshop is aimed at all administrators who are new to the world of research funding at the University of Alberta. The Life Cycle of a Grant will be explained from an administrator's perspective and guidance provided on how you can help make the process run most efficiently. The presentation will focus on what you need to know as you get started in your new position.

Presentation:



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[Overview of Research Administration at the U of A](#)

Learning Outcomes:

- At the end of this session, attendees will have a better understanding of the main RSO forms and when to use them.
- Attendees will also have an opportunity to ask questions specific to the stream of research funding they support.

Online Registration: <http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7402>



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SESSION DESCRIPTIONS

100 Level Sessions – Introductory

Session ID: RAD 102

Time: 10:45 to 12:00 pm

Room: ECHA L1-490

Title: Tri-Agency and University of Alberta Eligible and Ineligible Expenses

Presenter: Pat Jones, Research Facilitator-Health Sciences, Research Services Office

Description: This introductory level session on eligible and ineligible expenses will use the Tri-Agency Financial Administration Guide and the University of Alberta Policies and Procedures Online (UAPPOL) website as the main sources of information. Attendees will be made aware of the most common expenses that are eligible to be charged to research grants at the University of Alberta as well as the most common ineligible expenses. As well, participants will be advised on the procedure that must be followed if an ineligible expense is charged to a research grant.

Presentation:



Download PowerPoint

[Tri-Agency/University Policies \(Eligible & Ineligible Expenses\)](#)

Learning Outcomes:

- Attendees will walk away with a better understanding of the Tri-Agency and University of Alberta most common ineligible expenses.

Online Registration: <http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7404>



Research Administration Day (RAD) 2014

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SESSION DESCRIPTIONS

200 Level Sessions – Intermediate

Session ID: RAD 201

Time: 9:00 to 10:15 am

Room: ECHA L1-420

Title: Research Reporting

Presenter: Chandra Wanigaratne, Manager, Information Management, Research Services Office

Description: Review of research reporting from grant proposal to project spending and management: Researcher Home Page (RHP), electronic Tracking of Research Awards and Contracts (eTRAC), research nVision reports and Over Expenditure report.

Presentation:  [Download PowerPoint Research Reporting](#)

Learning Outcomes:

- Participants will learn how to use the above reports and search for information in the above reports from grant proposal to project spending and management.

Online Registration: <http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7414>



Research Administration Day (RAD) 2014

May 28, 2014

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SESSION DESCRIPTIONS

200 Level Sessions – Intermediate

Session ID: RAD 202

Time: 10:45 to 12:00 am

Room: ECHA L1-420

Title: Overview of Grants 3.0

Presenter: Michael Walesiak, Associate Director, Finance and Information Management, Research Services Office

Description: The University of Alberta has implemented the PeopleSoft Grants, Contracts and Projects Modules for a number of years, most recently upgrading to the 9.1 version of PeopleSoft Financials. Although the application is performing well for us, there are processes and reports from previous implementations that we wish to improve. In particular, there are some areas of the PeopleSoft system that we are streamlining to make less labour intensive and we are implementing more modern reporting tools. The areas that will most directly benefit researchers and administrators are discussed.

Presentation:



Download PowerPoint

[Grants 3.0 Overview and Change](#)

Learning Outcomes: Participants will be made aware of the new capabilities in the upgrade which include:

- Simplifying the maintenance and setup of research projects;
- Creation of a new “Grants Lifecycle” page;
- Introduction of the following on-line forms:
 - New Project Request,
 - Request for Project Amendment,
 - Request for Subgrant, and
 - Request for the Authorization of an Over Expenditure;
- Evaluation of and improved reporting tools; and
- Automation of the over-expenditure management process.

Online Registration: <http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7411>



Research Administration Day (RAD) 2014

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SESSION DESCRIPTIONS

300 Level Sessions – Advanced

Session ID: RAD 301

Time: 9:00 to 10:15 am

Room: ECHA L1-430

Title: **Agency Audits: What are the Auditors Looking For and How to be Prepared For One**

Presenter: Lorena Li, Manager, Continuous Improvement, Research Services Office

Description: The role of external audits for organizations using public money has been front and center in the media this year. Institutions that receive research grants come under scrutiny from provincial and federal Auditors General as well as from granting agencies themselves. A successful audit requires a great deal of planning and coordination and a strong internal control framework. This session will discuss strategies to prepare for such audits.

Presentation:  Download PowerPoint

[Agency Audits](#)

Learning Outcomes:

- Attendees will come away with a better understanding of what to expect on an agency audit and learn how to survive an on-site-audit and its follow ups.

Online Registration: <http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7407>



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SESSION DESCRIPTIONS

300 Level Sessions – Advanced

Session ID: RAD 302

Time: 10:45 to 12:00 am

Room: ECHA L1-430

Title: How to Initiate Spending of Research Funds

Presenter: Anna Minarchi, Financial Administrative Supervisor, Office of the Dean, Faculty of Physical Education and Recreation

Description: With Financial Services cracking down on journal transfers, it is essential that administrators have good record keeping to minimize transfers in and out of accounts. This is one of the topics of focus for this session. Other topics include travel expenses and reimbursements for both employee and non-employees; hiring lab staff, grad students and casual staff; and purchasing supplies and equipment using indent forms, corporate cards, and initiating service and/or purchase requisitions for purchase orders (PO's). The presenter is a faculty administrator who will share some of her experiences and “trench” stories. Do you have a “trench” story you want to share? There will be time for open sharing.

Presentation:



Download PowerPoint

[How to Initiate Spending of Research Funds](#)

Learning Outcomes:

- Participants will be provided with insights to some of the do's and don'ts an administrator may encounter with using funds from research projects.
- Participants will also learn some of the appropriate ways and tips on how to purchase and reimburse to minimize transfers between accounts.

Online Registration:

<http://rsoregistration.ualberta.ca/CourseDescription.do?courseid=7417>