

**WASHINGTON STATE UNIVERSITY**

**MyResearch Database Training**



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Office of Research Support and Operations  
Washington State University  
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**Why is Technology Important to ORSO?**

**Then...**

- 27 file cabinets.
- Lost files. Who has what?!
- Campus system complained.
- Walking across campus, then to our Office, was painful.
- Inaccurate and untimely reporting.
- Difficult time helping PI's.
  - "It's all about the faculty!"

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**Why is Technology Important to ORSO?**

**Now...**

- MyResearch Database - File cabinets from 27 to 1 and provided access to all.
- No lost files or System complaints. Tracking mechanisms created.
- Electronic routing and approval solved the walking problem.
- Accurate reporting.
- PI Dashboard has improved visibility.
- Continued improvements: New streamlined Routing and Approval Form, ORSO Dashboard, and "Drag and Drop".

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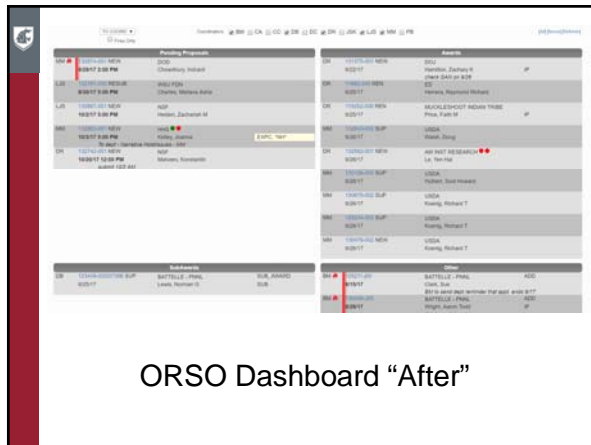
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This has been a  
WSU Training  
Videoconference

If you attended this live training session and wish to have your attendance documented in your training history, please notify Human Resource Services within 24 hours of today's date:

**hrstraining@wsu.edu**

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# PI Dashboard Checklist

Original Items	Warning Language
<b>Billing Information Alert</b>	You are within 30 days of the end date on your non-federal project. You may need to check with SPS on final billing on expenditure information.
<b>Classified Staff (clerical/admin.) on Federal Projects</b>	Classified Staff charges have been identified on this federal grant. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions. Note: Research Tech charges may be included on this list, causing the alert.
<b>Computing Equipment and Software Charges</b>	Computing equipment or software charges have been identified on this sponsored project. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Cost Share Alert</b>	Cost sharing obligations have been identified on this project, in the amount of (\$), and you are within 90 days of the end date of your project. Please work with your grants administrator(s) to verify these obligations are being met.
<b>Equipment Charges Near End of Project</b>	Equipment charges within the last 90 days of the projects Period of Performance have been identified on this sponsored project. This is a potential audit risk. Please ensure proper justification is documented (including how these charges benefit the project) and review with your grants administrator(s) if any questions.
<b>Expenses Exceed Revenue (overspending)</b>	Expenditures (\$) exceed 125% of Revenue (\$) on this sponsored project. Please review expense and revenue figures with your grants administrator(s).
<b>Excess Compensation Charges</b>	Excess Compensation charges have been identified on this sponsored project. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Expenditure Transfers at Start/End of Project</b>	Expenditure transfer charges within the first or last 90 days of the projects Period of Performance have been identified on this sponsored project. This is a potential audit risk. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Final Report Warning</b>	The period of performance on this project has ended within the last 90 days. Please work with your grants administrator(s) to ensure all final progress or financial reports are submitted as appropriate.
<b>Food Charges</b>	Food and beverage charges have been identified on this sponsored project. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Foreign Travel Charges</b>	Foreign travel charges have been identified on this sponsored project. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions. If federally funded, be sure and document any Fly America Act discrepancies that may have occurred.
<b>Office Supply Charges</b>	Office supply charges have been identified on this sponsored project. Normally this is unallowable. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Payroll Distribution Change</b>	A payroll distribution change of more than 25% for ____ has been entered in the past 90 days, which may be a potential audit risk. Please review with your grants administrator to ensure this change is correct in the central WSU systems.
<b>Terminal Leave Payout Charges</b>	Terminal leave charges have been identified on this sponsored project, which may be a potential audit risk. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.
<b>Time Extension Needed? (underspending)</b>	Expenditures (\$) are less than 75% of the Budget amount (\$), and you are within 45 days of the end of the approved Period of Performance. You may need to initiate a time extension request to complete the remainder of your project. Please review with your grants administrator(s).
<b>VISA Fee Charges</b>	Visa application fee charges have been identified on this sponsored project. This is a potential audit risk. Please ensure proper justification is documented and review with your grants administrator(s) if any questions.

<b>Additions to “Dashboard Warnings” tool</b>	<b>Description</b>
<b>NSF Over 2 Month Report</b>	This will show you all employees paid more than 2 months on NSF funding in the last year. As a general policy, NSF limits the salary compensation requested in a budget for senior personnel to no more than two months of their regular salary in any year – this can help find people that may be senior personnel (more verification may be required).
<b>Recently Closed Accounts</b>	This will show you accounts that have closed within the last 30 days.
<b>Budget Exceeds Revenue on Closed Accounts</b>	This will show you accounts where the budget amount exceeds the revenue amount on a closed account (accounts closed more than 90 days and less than 2 years ago).
<b>Cost Share being Over Met</b>	This will show you accounts that are reporting more cost share dollars than obligated in the system.
<b>Expenditures Exceed Revenue on Closed Account</b>	This will show you closed accounts (since 2009) where our total expenditure amount exceeds the revenue total.
<b>F&amp;A Discrepancies</b>	There can, at times, be issues with how the current financial system tracks F&A expenses on projects that have many F&A exclusions (the numbers can get “off” and need reconciled down the road). This report identifies those types of accounts, where this funding is off by \$1 or more.
<b>Missing Budget Info</b>	This will show funded projects that have a missing WSU Program, Budget or Project in the MyResearch database.
<b>Payroll Expense Transfer at Start/End of Project</b>	These reports will show you a list of projects where we have identified a payroll expense transfer within the first or last 90 days of the projects Period of Performance.
<b>Revenue Exceeds Expenses on Closed Accounts</b>	This will show you accounts where the revenue amount exceeds the expenditure amount on a closed account.
<b>Expenditures Exceed Budget</b>	This will show you accounts where the expenditure amount exceeds the budget amount (accounts where budget is greater than \$0).