

## Research Administration Day (RAD) 2016

June 1 , 2016

*“Are we Ready? Tri-Council Monitoring Visit”*



### REGISTRATION / INFORMATION BOOTH / OPENING REMARKS

#### RAD Registration/Information Booth

**Time:** 8:00 to noon  
**Room:** ECHA L1-49  
**Description:** Light refreshments provided

#### RAD Introduction/Opening Remarks

**Time:** 8:30 to 8:45 am  
**Room:** ECHA L1-490  
**Introduction:** **Lorraine Deydey**, Director, Research Services Office  
**Presenter:** **Lorne Babiuk**, VP Research

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#### SESSION DESCRIPTIONS 100 Level Sessions – Introductory

<b>Session ID:</b>	<b>RAD 101</b>
<b>Time:</b>	9:00 to 10:15 am
<b>Room:</b>	ECHA L1-TBA
<b>Title:</b>	<b>Introduction to Research Administration</b>
<b>Presenter:</b>	<b>Pat Jones</b> , Research Facilitator, Research Services Office (RSO)
<b>Description:</b>	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.
<b>Learning Outcomes:</b>	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.

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#### SESSION DESCRIPTIONS 100 Level Sessions – Introductory

<b>Session ID:</b>	<b>RAD 102</b>
<b>Time:</b>	10:45 to 12:00 pm
<b>Room:</b>	ECHA L1 - TBD
<b>Title:</b>	<b>Tri-Agency and University Expense Eligibility and Compliance</b>
<b>Presenter:</b>	<b>Lan Chan-Marples</b> , Research Facilitator, Research Services Office (RSO) <b>Dawne Pewar</b> , Research Support Administrator, Research Services Office (RSO)
<b>Description:</b>	This introductory level session on eligible and ineligible expenses will use the <i>Tri Agency Financial Administration Guide</i> and the <i>University of Alberta Policies and Procedures Online</i> (UAPPOL) website as the main sources of information. In addition, the <i>University's Guide to Financial Management</i> will be referenced as a source of information about what constitutes “appropriate back up documentation” to support expenses. Attendees will be made aware of the most common eligible and ineligible expenses charged to research grants at the University of Alberta. Additional information shared in this session will be an explanation of what is expenditure testing, why the RSO does this, and what are the results?
<b>Learning Outcomes:</b>	Attendees will walk away with a better understanding of Tri-Agency and University of Alberta’s most common ineligible and non-compliant expenses.

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#### SESSION DESCRIPTIONS 200 Level Sessions – Intermediate

**Session ID:** RAD 201

**Time:** 9:00 to 10:15 am

**Room:** ECHA L1-TBD

**Title:** Best Case Scenario – Tri-Council Monitoring Visit

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

**Description:** The University of Alberta is scheduled to undergo a Tri-Agency Financial Monitoring Review during the second half of Fiscal 2017 and this session will discuss our strategies for ensuring we are prepared for this significant event. As a condition of receiving Tri-Agency funding, participating institutions such as the University of Alberta are also given the right and responsibility to withhold and withdraw approval of expenditures that contravene the agencies' requirements. A Financial Monitoring Review will:

- assess the effectiveness of policies, systems and internal controls within the institution,
- confirm that the institution fulfills its research grant funds management responsibilities,
- ascertain the level of confidence that research funds are used in accordance with Tri-Agency requirements, and
- share and disseminate information on guidelines and expectations for the continuous improvement of research fund management.

A successful audit requires a great deal of planning and preparation for both researchers and administrators and this session is the kick-off of these activities.

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### SESSION DESCRIPTIONS 200 Level Sessions – Intermediate

**Session ID:** RAD 202

**Time:** 10:45 to 12:00 am

**Room:** ECHA L1-TBD

**Title:** **The Challenges of Multi-Sponsor Partnership Projects**

**Presenter:** **Amanda Rosneau**, Manager Partnership Projects, Partnerships and Institutional Projects, Research Services Office (RSO)  
**Nancy Klimczak**, Assistant Director, Partnership and Institutional Projects, Research Services Office (RSO)

**Description:** Join us for a discussion around some of the issues that make multi-sponsor agreements more challenging to negotiate and manage through the post-award/reporting periods. Learn how RSO, researchers, faculties and sponsors can work together to ensure the process runs as smoothly and efficiently as possible. We will touch on topics such as confidentiality issues and intellectual property in the context of matching programs such as: NSERC Collaborative Research and Development projects (CRDs) and Industrial Research Chairs (IRCs); Agriculture Funding Consortium funding; consortia; and more. Special focus on considerations for subgrants using multiple funding sources, and on some recent feedback from NSERC on post-award management of matching awards.

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### SESSION DESCRIPTIONS 300 Level Sessions – Advanced

**Session ID:** RAD 301

**Time:** 9:00 to 10:15 am

**Room:** ECHA L1-TBD

**Title:** SupplyNet – Introduction to UAlberta’s New Purchasing Platform

**Presenters:** *Wendy Abel*, Director Procurement & Contract Management, Supply Management Services  
*Stefan Sicking*, eProcurement Consultant

**Description:** Come join us for an overview of the University’s new eProcurement solution. Learn how this highly ranked cloud-based solution will change research purchasing processes and gain an understanding of the significant benefits. We will walk through the steps in the purchase to payment process. SupplyNet is easy to use and will only get better with frequent product improvements and our plans to add to more supplier catalogues – so stay tuned.

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### SESSION DESCRIPTIONS 300 Level Sessions – Advanced

**Session ID:** RAD 302

**Time:** 10:45 to 12:00 am

**Room:** ECHA L1-TBD

**Title:** The PeopleSoft HCM Upgrade – What it means for you?

**Presenters:** *Terry Harris*, PMP, Senior Program Manager, Information Services and Technology (IST) and *Fatima Mirza*, Director, HR Operations. Human Resource Services

**Description:** This summer, the University of Alberta will be upgrading its PeopleSoft human capital management (HCM) system. This upgrade will introduce a number of significant changes to how we use PeopleSoft. With that comes the opportunity to introduce new features and functions to improve current business processes and access to information. This informative session will provide you with an overview of the changes and new features that will be of particular interest to the research community.

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