

Financial Management for Grants and Clinical Trials: Tools and How to Use Them

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Minute Marker	Topic
2:15	Introduction to Financial Management Tools
4:06	Tools for Managing your funding: Differences of PI Portal and Workday
5:48	Award Structure- why it matters
9:00	Workflow for purchases (encumbrances)
11:00	Question -Patient Care Costs and establishment of separate grants on the award
12:08	Accessing the Reports in PI Portal and Workday
13:40	Question - Regarding EPA-005 and when is it initiated
14:45	Question - difference with PI Portal and Workday (does Portal have all the info)
16:00	PI Portal-Log-in information
16:40	Search bar
17:25	Access Controls for Staffing in PI Portal
19:07	Demonstrating Investigator Access
20:06	Proposals (not all are awarded)
21:54	Awards Tab
22:39	Awards Page – High Level of Info on Contract
25:07	Demographics Tab
27:30	Grants Tab
28:09	Financials Tab
30:40	Grant Page Detail (subset of the award)
32:37	Demographics- this is where a PI can grant team member access to only specific grants and not all of the PI's awards
35:50	Review of Overview Column Heading Definitions (budget, expended, committed and balance)
37:50	Question -Who is Billing Specialist?
38:40	Export Button/ Period button
39:22	Expenditures Tab- and sorting capabilities
41:00	Purchase Order Numbers
41:27	Commitments Tab
43:30	Payroll Tab (does not show amount of effort)
45:17	Workday
46:12	Grants Administration Dashboard
47:38	Grants Detail
48:20	Budget vs Actual Overview
50:22	Blue Drill Down Numbers
50:46	Personnel Expenditure Summary (effort allocation)
51:41	Non-personnel Expenditure Summary (helpful for detailed purchase orders and expenses)
52:40	Purchase Order Number Searches