**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 |