Answers to questions from chat log/live questions during June 23/22 session

(for any inconsistencies between answers given verbally during live presentation and the information below, please note that the information provided below takes precedence)

• When you have a position where the individual is working across multiple grants and you're the PI on all of them, is there a way to view that as a position or an individual?

A: You can do so from the "Positions Being Paid From Grants" applet by filtering for the specific position - the filter options should allow you to choose the "contains" option, and by keying in partial data (for example part of the employee's family name or their position number), this should allow you to filter down to the specific positions or individuals you wish to view.

• I am research staff with Grant Manager access to grants for more than 1 PI. Is there a way to filter the lists of grants for just 1 PI at a time in the Research Grants Dashboard?

A: There is a way to filter down for each applet showing on the Dashboard.

For the "Portfolio of Grants" and the "Grants Expired and Expiring in 90 Days" applets, by selecting "View More...", you have the option to filter by a particular person (in this case, by PI) by keying in their name and selecting it from the options list that pops up beneath your entered data.

For the "Positions Being Paid From Grants" applet, you can filter using the "Grants" column and key in the family name of the PI (as all Grant worktags contain the PI's family name as a part of the worktag).

Please note that an online course now exists for the Research Grants Dashboard and its associated reports.   It can be found on Canvas, and it is called "Workday for Grants Management".