



**Which Finance Tool is
right for me?**

Which Finance Tool is right for me?



<u>Financial Toolkit</u>	<u>GLEZ</u>	<u>Financial Compass</u>	<u>PI Portal</u>	<u>DataND</u>
Is a suite of administrative tools used to generate financial transactions such as journal vouchers, cash deposits, payments to businesses and individuals, and labor distribution changes	Is a web-based application providing easy access to financial information-query fund balances and budget summaries for funds you manage	Is an application for budget planning, forecasting and multi-year planning	Provides Notre Dame faculty researchers easy access to management of external research portfolio	Platform allows the campus community consistent, effective, secure data shared to build reports



Which Finance Tool is right for me?

Question	Financial Toolkit	GLEz	Financial Compass	PI Portal	DataND
Submit a Journal Voucher, Payment Request or Cash Deposit					
Monitor your expenses and balances					
Develop and report on your budget					
Monitor your proposals and awards					
Use pre-developed reports or build your own.					



Financial Toolkit Tasks

Question	Financial Toolkit	GLEz	Financial Compass	PI Portal	DataND
Submit or Approve a Journal Voucher to move costs					
Submit a Cash Deposit					
Create or Approve a payment requisition to pay a non-buyND invoice					
Update a labor distribution for an employee					
Provide compliance information for Irish1Card charges					
Search for transactions entered within the Toolkit					



Glez Tasks

Question	Financial Toolkit	GLez	Financial Compass	PI Portal	DataND
Find Available balances for my funds					
Monitor activity within my funds for reasonableness					
See invoice documents or other detailed transaction information					
Review who has been paid within my labor accounts					
Search for transactions across all my funds					
Find pre-developed reports for my unit (i.e comparative reports, etc.)					



Financial Compass Tasks

Question	Financial Toolkit	GLEz	Financial Compass	PI Portal	DataND
Create/review budgets for my operating units and restricted funds					
Forecast and plan throughout the current year month by month					
Plan multi-year activities					
Plan funding transfers between activities					
Find pre-developed reports for my unit (i.e comparative reports, etc.)					



PI Portal Tasks

Question	Financial Toolkit	GLEz	Financial Compass	PI Portal	DataND
Find proposal and award information for sponsored programs					
Find news, notifications, and current and pending information					
Review sponsored programs metrics via dashboard					
Manage research finances to include all discretionary and designated funds					
Find pre-developed reports for analytics for my awards (i.e monthly burn rate, expenditures by sponsored categories, etc.)					

DataND



Question	Financial Toolkit	GLEz	Financial Compass	PI Portal	DataND
Find pre-developed reports for my unit (i.e. Endowment Reports, comparative analysis, etc.)					
Develop custom visualizations for your expenses and balances					
Learn about tools and data that you can access for self service service analytics.					
Combine financial data with data from other data domains (i.e. student, faculty, staff, building, etc)					
Publish financial reports and analysis that you'd like to securely share with the institution.					