

Oracle PeopleSoft Grants

Oracle’s PeopleSoft Grants makes the most of your resources and allows you to focus on growing your portfolio of sponsored awards, increase operational efficiencies, adhere to regulatory requirements, and drive fiscal accountability throughout your organization. With role-focused interfaces, alerts, and tools, you can improve compliance throughout the lifecycle of sponsored awards.

PROACTIVELY MONITOR AWARD DELIVERABLES

Powered by the PeopleSoft Fluid User Interface, the Grants Management Homepage enables award administrators to monitor (by-exception) key events in the proposal and award life cycle. Cost accountants proactively take action to reduce pre-award spending as cost thresholds are reached. Billing professionals and principal investigators are notified of awards and certifications due to expire before becoming issues. Prior to an award ending, cost managers are alerted to unused funds on expiring letters of credit. From the Grants Homepage, users can address issues effectively and proactively before they affect other areas of your organization.

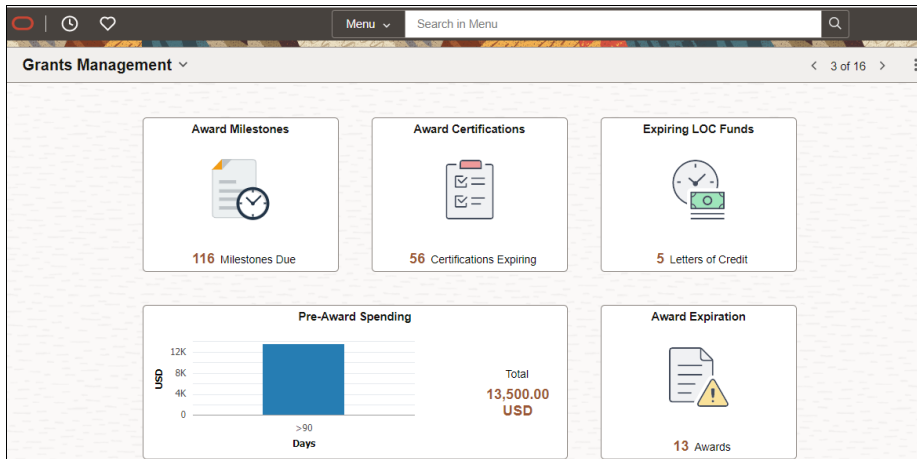


Figure 1. The Grants Management homepage provides access to the tools used to manage awards, including tiles to review milestones, expiring awards and certifications, and letters of credit with remaining funds.

Monitor Milestone Status, Pre-Award Spending and Award Expiration in Fluid

The Award Milestones tile provides principal investigators and award administrators insight into the status of their milestones. Milestones are categorized as overdue or due in the next 30, 60 or 90 days, based on their due

Simplified Navigation

The Grants homepage replaces cumbersome, folder-driven navigation paths with tiles to access the most used components. In addition to the homepage, Grants provides the following navigational aids to streamline navigation:

- Navigation Collections

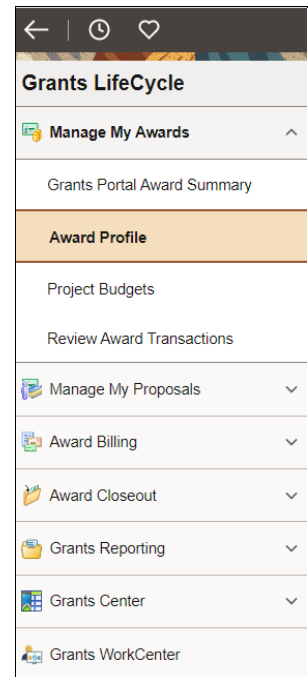


Figure 2. Configurable to each organization, a navigation collection includes the frequently used components for an award administrator or contract administrator.

- Navigational Search

date. You can differentiate billing milestones from other monthly and annual reporting milestones using a milestone type and a milestone code.

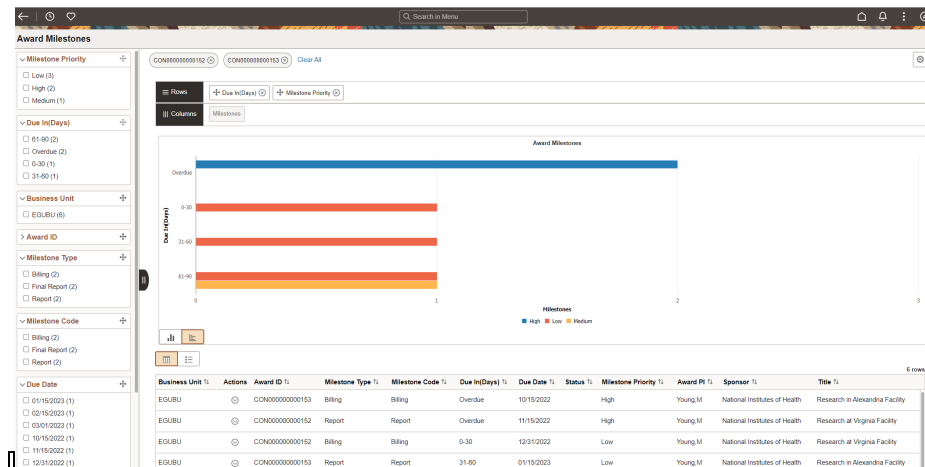


Figure 3. Pivot grids and charts provide slice and dice capabilities to identify overdue milestones with related actions to quickly update status, due dates, and priority.

Pivot Grids provide interactive operational analytics that enable filtering and “slicing and dicing” award and project data. Pivot grids allow award administrators to quickly and independently answer a variety of business questions and adapt the pivot grids as business needs evolve. Pivot Grids in Grants have contextual related actions to:

- Update awards, contracts, and projects.
- Notify and collaborate with team members.
- Maintain attachments.
- Update certification dates, expiration dates, exemption numbers, and review classifications.
- Compare cost, billing, and funding for expiring letters of credit.
- Extend award end dates, funded expiration dates, commitment control dates, and project period of performance dates.

Streamline Award Administration

PeopleSoft Grants guides you through the lifecycle of the pre- and post-award process to boost productivity, facilitate accurate accounting and documentation, and ensure compliance. Maximize the efficiency of limited resources using templates and defaults to automate key functions, streamline administrative activities, and automate approvals. This solution also offers flexibility to adjust the specific needs of your sponsors and your management team.

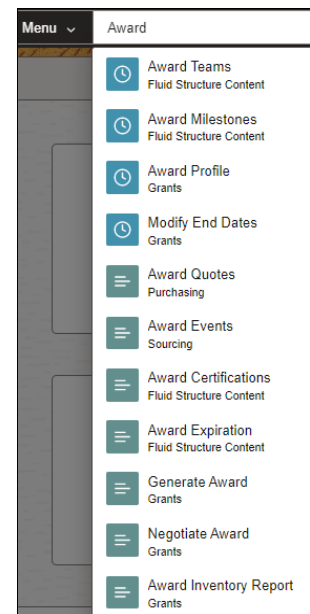


Figure 4. Use PeopleTools text-based Navigational Search to locate the components needed to perform your job.

Modify End Dates

Award ID: CON000000000153 | Title: Research in Alexandria Facility
 Reference Award Number: 2019-00900 | Contract Type: COST_REIMBURSBL
 Federal Award Identification Number: N0009000 | Award PI: Young M
 Award Start Date: 01/01/2019 | Award End Date: 06/30/2023

Contract Lines

Select	Line	Product	Description	Price Type	Start Date	End Date	Status
<input type="checkbox"/>	1	GRANTS_REIMBURSABL	Grants Reimbursable	Rate	01/01/2019	06/30/2023	Active

Associated Projects & Activities

Select	Actions	Project	Project Start Date	Project End Date	Activity	Activity Start Date	Activity End Date
<input type="checkbox"/>	▼ Actions	000000000000280	01/01/2019	06/30/2023	BUD	01/01/2019	06/30/2023

Award Funding

Select	Project	Period	Begin Date	End Date	Funded Amount	Currency
<input checked="" type="checkbox"/>	000000000000280	1	01/01/2019	06/30/2023	50000.000	USD

Copy End Dates

New End Date: Copy Near End Date

Figure 5. Use the Modify End Dates feature to synchronize the end date of an award with the related contracts, projects, activities, and commitment control budgets.

PeopleSoft Grants allows you to:

- Manage proposals that include complex relational structures, varying sites and rates, and multiple budgets.
- Configure workflow processes to automate the approval of awards, which facilitates efficient communication between different project roles in the Proposal to Award lifecycle.
- Automatically create the required elements for award management from your proposal data including budget, revenue, and billing requirements.
- Assign default facilities and administrative cost rates by institution.
- Track changes to award funding and modification.
- Automate updates to awards, contracts, and project end dates, which promotes consistency across applications.
- Assign one or more Principal Investigators (PIs) to individual grants.
- Maintain professional profile information for the PI, Co-PI, and others associated with your proposal.
- Generate a SF-425 Federal Financial Report that can be edited to meet institution-specific award reporting needs.
- Enter and track sponsor and institution-specific informational data elements using the supplemental data framework.
- Track and monitor project costs from a role-based portal.

Key Business Processes for Sponsored Research Organizations

- Proposal Data Capture and Submission
- Award Approvals in Fluid
- Letter of Credit Processing
- Payment Processing
- Award Administration
- Milestone Management
- Budget and Funding Administration
- Financial Analysis
- Award Closeout

- Monitor the balance, use, and expiration date of individual advances, as well as view the overall totals for all advances associated with an award.
- Control the order of transaction billing through a configurable limit-checking template to ensure compliance with sponsor billing requirements.
- Streamline the customer invoice process by sending transactions for finalization in PeopleSoft Billing, followed by integrations with PeopleSoft Receivables and General Ledger.
- Ensure that awards are properly closed using tools to monitor closeout activities.

Centralized Reporting and Analysis

The Grants Portal provides principal investigators, project managers, department administrators, and other staff members insight into the financial status of sponsored awards and projects. The Grants Portal allows you to efficiently access and manage your awards, grant projects, and resources associated with those projects.

The Grants Portal provides:

- Drilldown capabilities into transaction details and documents.
- Budget, commitment, and financial statistics and balances by award, project, and resource.
- Personnel cost details and summaries.
- Flexible saved search criteria that each user can personalize.
- Security administration that business analysts and non-IT resources can manage.
- Links to other key features in PeopleSoft Grants.

The Grants Portal places the tools and essential information into the hands of those who are closest to sponsored projects and have fiscal responsibility for valuable grant-funded initiatives.

Core Capabilities of PeopleSoft Grants

- Comprehensive Data Capture from Proposal to Award
- Control and Visibility into Award Modifications and Funding
- Flexible Facilities and Administrative Rate Processing

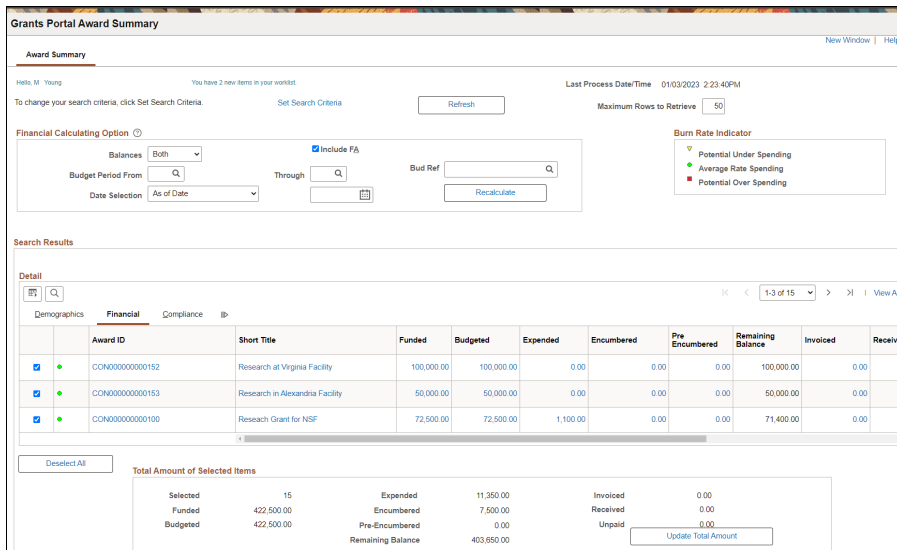


Figure 6. Use the Grants Portal to view summarized financial information for awards, including funding, budgeted cost, expended cost, encumbrances, and billing.

Extensive Integration

PeopleSoft Grants integrates with other PeopleSoft Financial applications, streamlining the pre- and post-award processes. In addition, It integrates with third-party systems, to offer a unique and flexible platform for controlling and managing the complete grant lifecycle from proposal to award. Grants works with other applications to:

- Seamlessly transition proposals into awards with the click of a button.
- Automatically create budgets directly from proposal data.
- Review and access journal entries, expenditures, requisitions, purchase orders, vouchers, and payroll costs; in real time.
- Drill into transactional systems for more detailed information on individual transactions.
- Create new contracts as part of the award generation process.

Oracle's PeopleSoft Enterprise Service Automation Solutions

Oracle's PeopleSoft Grants is part of the PeopleSoft Enterprise Service Automation (ESA) suite, an integrated family of contract, grant and project management applications.

Related Products

PeopleSoft Grants closely integrates with PeopleSoft:

- Project Costing
- Contracts
- Billing
- General Ledger

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