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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 insights, 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.
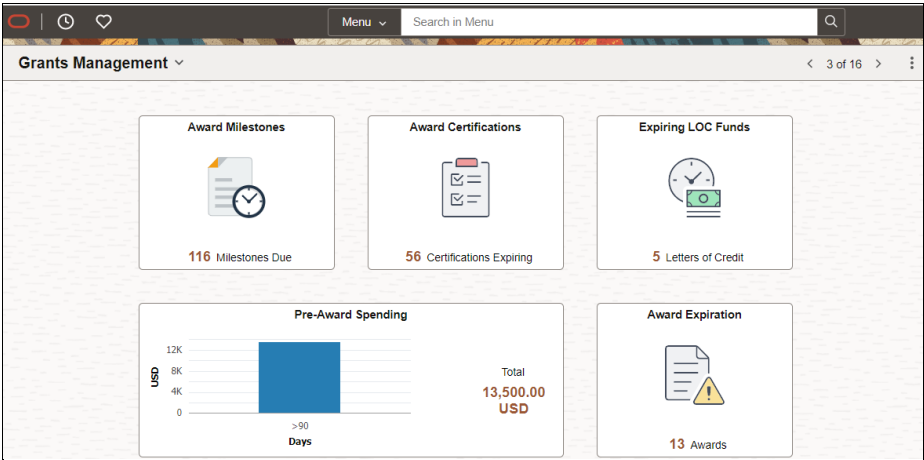

Figure 1. The Grants Management homepage provides access to the tools used to manage awards, including tiles to review milestones, expiring awards and certifications, and letters of credit with remaining funds.

Centralized Reporting and Analysis

Award Portal Insights provide principal investigators, award administrators, and department managers financial and non-financial information for their sponsored awards and projects. The Award Portal allows you to efficiently access and manage your awards, grant projects, and resources associated with those projects.

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:
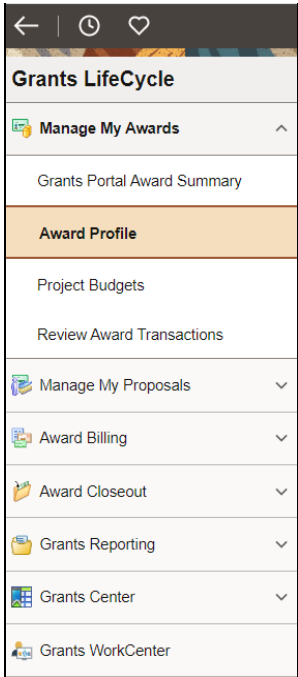
- Navigation Collections

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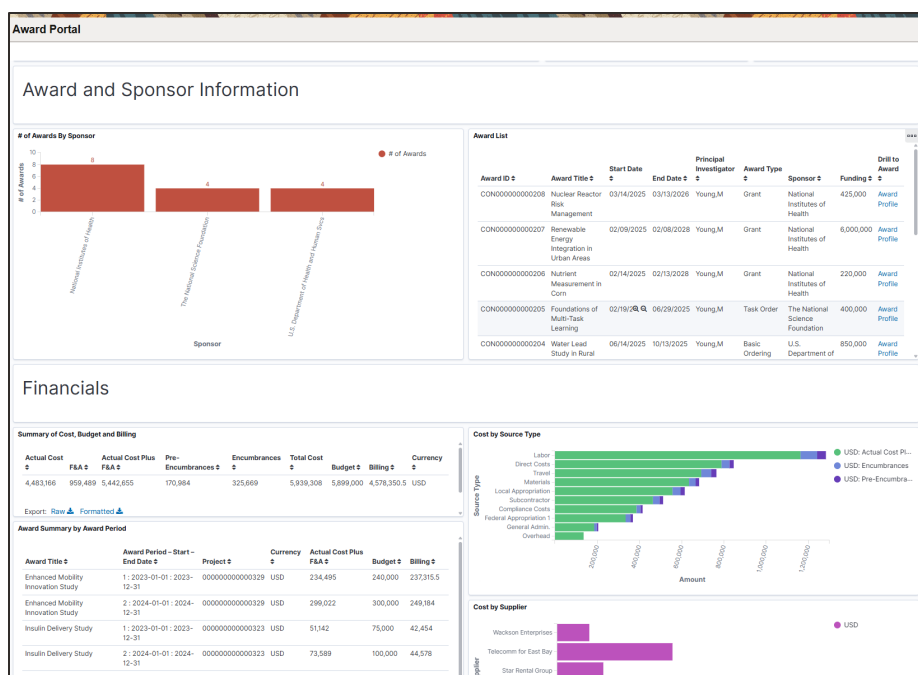
- Navigational Search

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Figure 3. Use the Award Portal to view summarized financial and non-financial information such as milestone status.

The Award Portal provides a listing of your active awards including:

- Budget, actual cost, and commitment balances by award and project.

- Personnel and supplier cost details and summaries.

- Award milestone status with links to attachments.

- Modifications by period.

- Views into future award starts and proposals in progress.

- Links to award profiles.

The Award 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.

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.
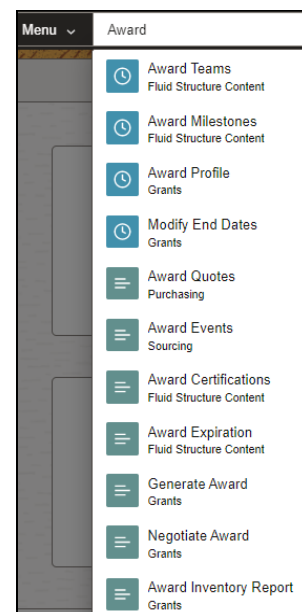

Figure 4. Use PeopleTools text-based Navigational Search to locate the components needed to perform your job.

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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.

Figure 6. Use the Contract and Award Update Wizard to update information en masse across the organization in a single action.

When individuals leave the organization or change roles, use the Contract and Award Update Wizard to update all the impacted contracts and awards en masse including:

- Award Reporting Roles
- Billing Specialists
- Contract Administrators
- Post Award Administrators
- Principal Investigators

As you approach closeout, you can update Award Status and Assistance Listing Numbers when changes are required.

Core Capabilities

PeopleSoft Grants allows you to:

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

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- 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.

- 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.

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.

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

Related Products

PeopleSoft Grants closely integrates with PeopleSoft:

- Project Costing

- Contracts

- Billing

- General Ledger

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- 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.

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