



Functional Course

PeopleSoft v9.2 Grants

Financials Supply Chain Management (FSCM)

Agenda

Developed for implementation team members and functional end users, PeopleSoft Grants Management v9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the Grants module. Through scenarios, real-world experiences from implementers, and hands-on activities, students gain an understanding of how to establish process and report on transactions.

Prerequisites:

- PeopleSoft v9.2 Foundations (FSCM)

Introduction

- Grants Management Overview
- Resources/Tools
- Integration with PeopleSoft Applications
- Grants Life Cycle
- Project Costing Chartfield Structure

Grants Configuration Order and Defaults Consideration

- Configuration Order
- Commitment Control Overview
- Products & Product Defaults

Defining Business Unit and Award Set Up

- Contracts BU Definition
- Project Costing BU Definition
- Award Set Up and BU Definition
- Facilities Admin Options
- Direct Cost Sharing

Structuring Grants

- Institution Control Table Set Up
- Sponsor Control Table Set Up
- Professional Control Table Set Up
- Proposal Control Table Set Up
- Milestone Type/Code Set Up
- Accounting Rules Set Up

Maintaining Grants

- Creating Institutions
- Creating Sponsors
- Maintaining Grants Departments
- Creating Sub-recipients
- Defining Contracts Workbenches

Grants Security

- Defining Grants Security

Pre-Award

- Creating a Proposal
- Reviewing a Proposal Budget
- Coping a Proposal/Version/Budget Period
- Submitting a Proposal

Negotiate Award

- Negotiating an Award

Generate Award

- Generating an Award

Award Set Up

- Updating an Award Profile
- Updating a Contract
- Updating a Project
- Updating an Activity
- Posting a Grants Budget
- Reviewing Budget Details/Overview

Blue Bird Award

- Creating an Award without a Proposal

Funds Distribution

- Setting up Funds Distribution
- Running Funds Distribution

Manage Grant Costs

- Running Cost Collection
- Reviewing the Transactions List
- Limit Processing

Processing Facilities & Administration

- Understanding the F&A Process
- Processing Facilities & Administration
- Processing F&A Adjustments

Revenue Recognition

- Processing As Incurred Revenue

Billing

- Processing As Incurred Billing
- Streamlined Billing
- Billing Worksheet
- Letter of Credit Processing
- Billing Batch Processing

Collections and Payment Application

- Creating and Applying Payment
- Refunds & Direct Journals

Agenda

GL Integration

- Journal Generating
- Integration and Reconciliation Considerations

Grants Reporting

- Grants WorkCenter
- Grants Portal
- Contracts Workbench
- FFR

Create Non-Competing Continuation

- Creating a Non-Competing Continuation

Grants Close Out

- Closing a Project
- Closing Budget
- Closing a Contract
- Closing an Award

Grants Workflow

- Milestone
- Proposal
- Protocol

Appendix

- Grants Portal Set Up
- Protocols
- Unlocking Proposals
- Add/Adjust Transactions
- Supplemental Data
- Pre-paids