

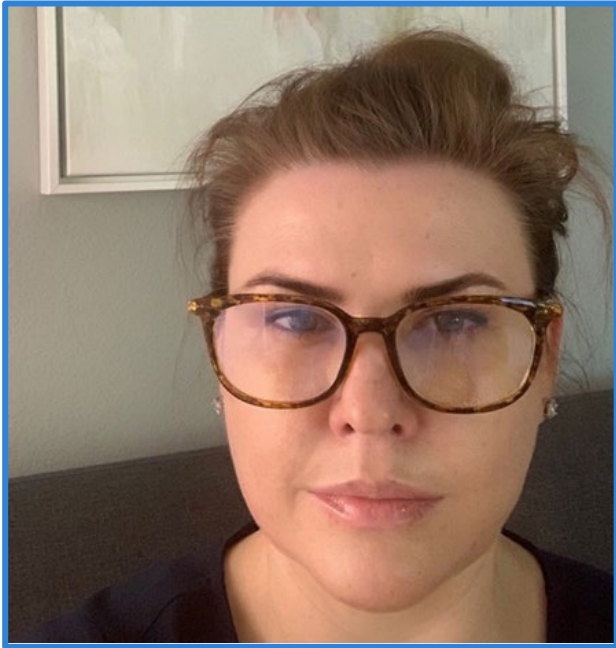
A Fresh Look at PeopleSoft Grants Management

P-049641

Agenda

- Introductions
- Grants Management Overview
 - Integration and Benefits
 - What's New/Demo
- Kaiser Permanente Case Study
- What's New/Coming
 - Kaiser Permanente (PUM 44-49)
 - PUM 50-51 Highlights
 - Roadmap

Meet the Team



Yuliya Ivanova

Kaiser Permanente

Sr. Business Analyst, Grants & PC

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Jessica Mann

SpearMC

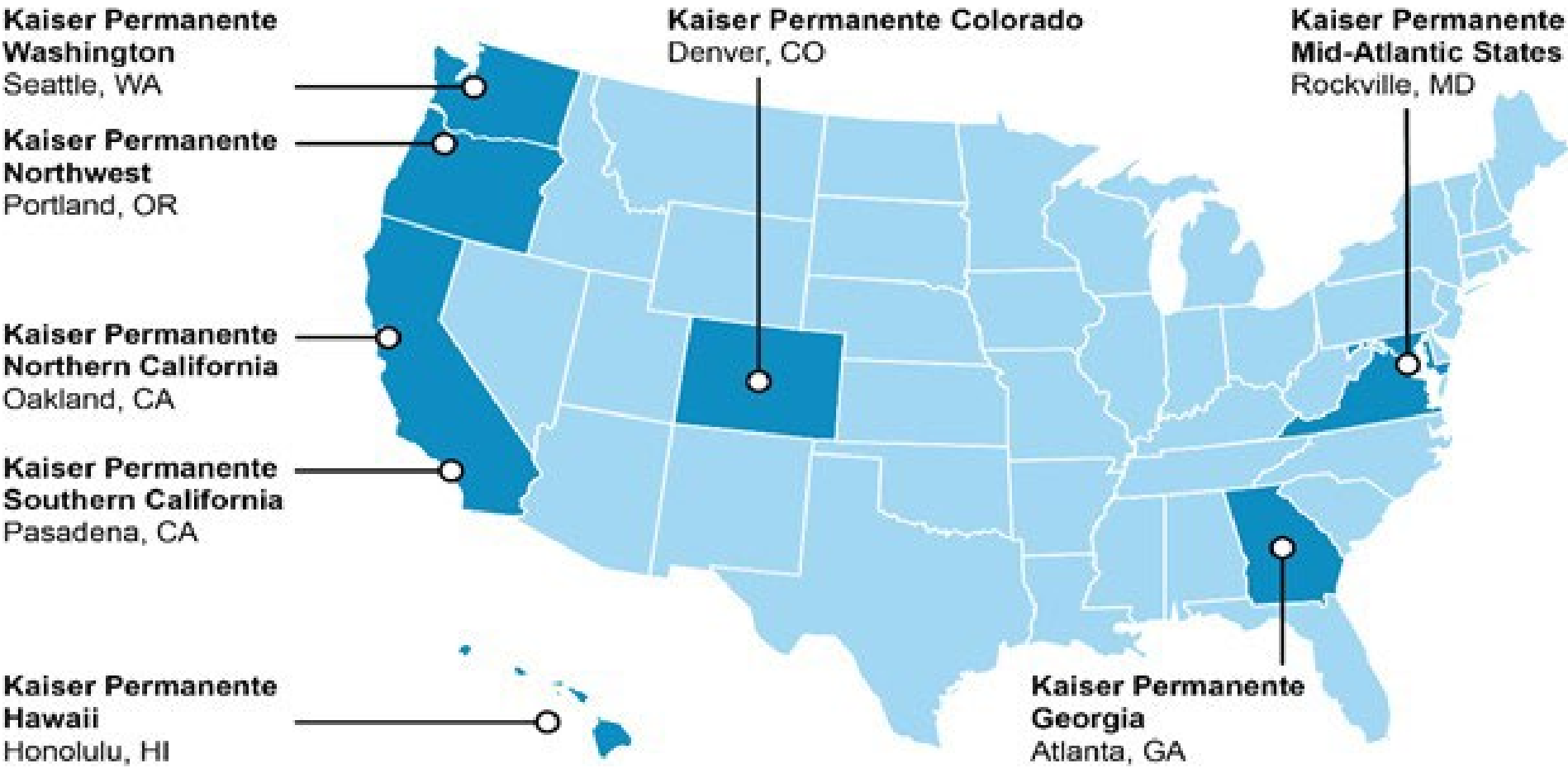
Managing Director,

jessica.mann@spearmc.com

Session Overview

Does your organization receive Grant funding but you are not utilizing PeopleSoft Grants to manage your proposals and awards in PeopleSoft? Come take a fresh look at PeopleSoft Grants and learn the benefits that the Grants Management suite of functionality has to offer including providing a single source of truth for detail and summary grant data; automating complex calculations like burdening, overhead, revenue; having flexibility and controls to meet sponsor requirements; providing proactive management of key grant deliverables; etc.

KP Grants Markets



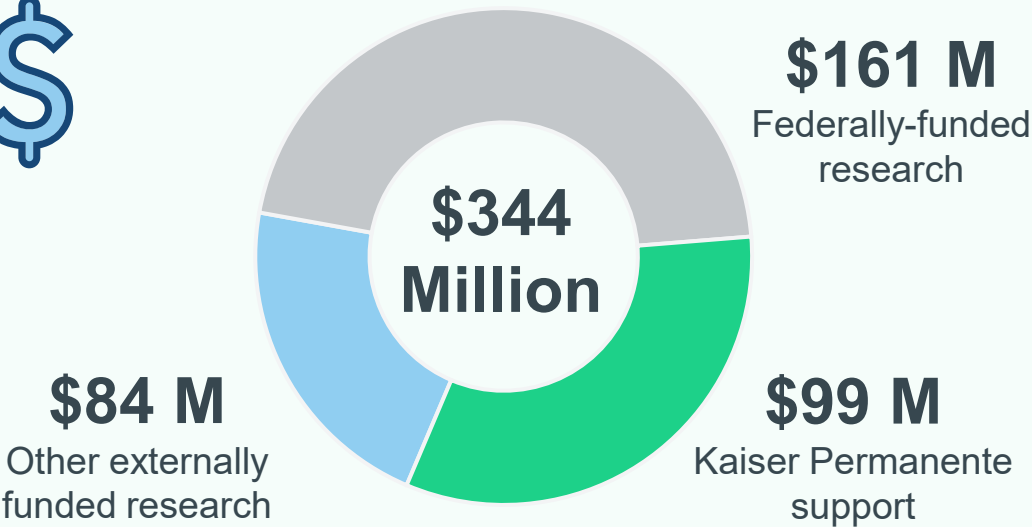
About Kaiser Permanente

We Are the Nation's Largest Integrated Health System...

23.7 K + physicians deliver high-quality care to Kaiser Permanente members 	12.6 M people get care + coverage from Kaiser Permanente	 \$93.1B revenue	
	 217K + employees improving the health of people + communities	 39 Hospitals +  734 medical offices	65 K + nurses are at the center of our care 

Kaiser Permanente Research Fast Facts, 2022

Funding in 2022^a



Research Studies Underway in 2022



Research Personnel^a

180
Full-time
research leaders



1,640
Research
support staff

Research Publications

1,980
Journal articles
published in 2022



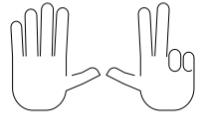
28,100
Articles total
since 2000^b

^aRefers to the 9 research centers (8 regional centers and KPSOM)

^bRefers to total count of all articles (research and non-research) from 2000 to the present in the Kaiser Permanente Publications Library available at <https://kpresearchpublications.kp.org/>



OUR DEPLOYMENTS



**STANDARDIZED
ACROSS ALL OF
OUR 8 REGIONS**

900,000

Jobs Processed Monthly

OUR CAPABILITIES

- Systems Strategy
- Systems Implementation
- Governance
- Project Management
- Process Optimization
- Reporting and Analytics
- Production Support



ONELINK BY THE NUMBERS

248,000 Users

Approximately 12,000 employees use OneLink daily, processing over **75 Million** distinct financial, supply chain and general support transactions annually

Accounts Payable

Transactions

9.9 Million

Amount

\$24.6 Billion

Purchase Orders

Transactions

4.3 Million

Amount

\$13.4 Billion

Expense Reports

Transactions

470 K

Amount

\$311 Million

sPro Invoices

Invoices

257 K

Amount

\$789 Million



FAST FACTS

Production Support Tickets

40,700

Tickets Opened
(Oct 17 – Sept 18)

39,500

Tickets Resolved
(Oct 17 – Sept 18)

70%

Tickets resolved
within 2 days

93%

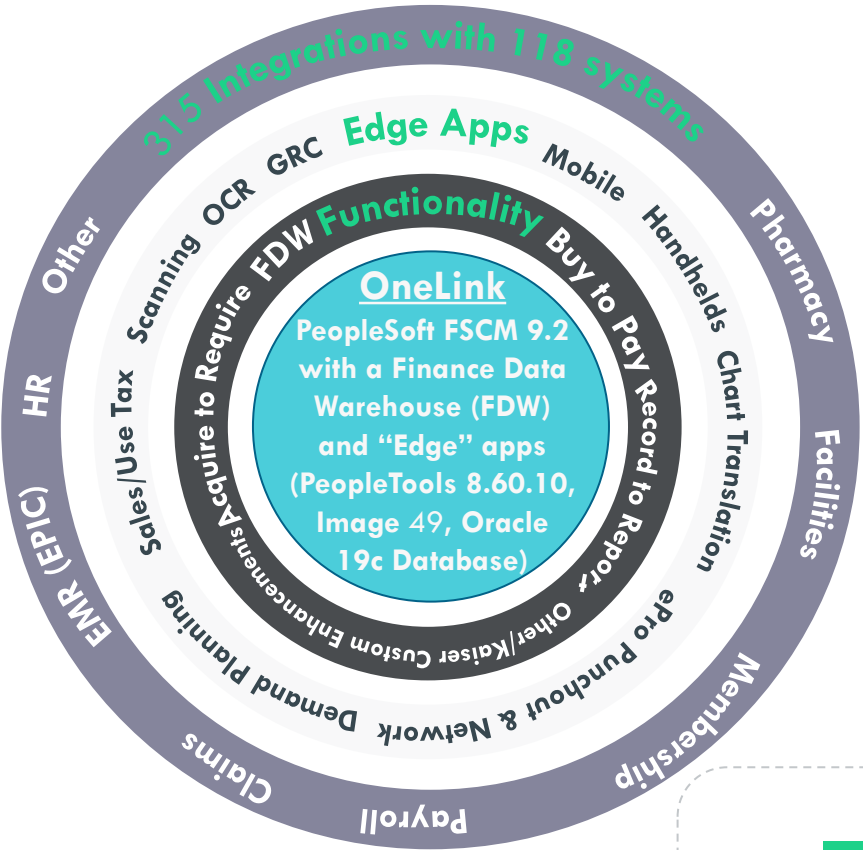
Tickets resolved within
21 days

99%

System Availability

**LARGEST PEOPLESFT SINGLE-
INSTANCE IN THE HEALTHCARE
INDUSTRY**

OneLink Platform Overview



Platform Functions

Procure to Pay (Buy 2 Pay)

- eProcurement
- Purchasing
- Inventory & Cost Management
- eSupplier Portal
- Services Procurement
- Accounts Payable
- eSettlements
- Travel and Expenses
- Sourcing
- Supplier Contract Management

Record to Report

- Treasury
- General Ledger
- Grants, AR, Billing, Contracts
- Time Reporting

Acquire to Retire

- Asset Management
- Lease Management
- Project Costing
- Commitment Control

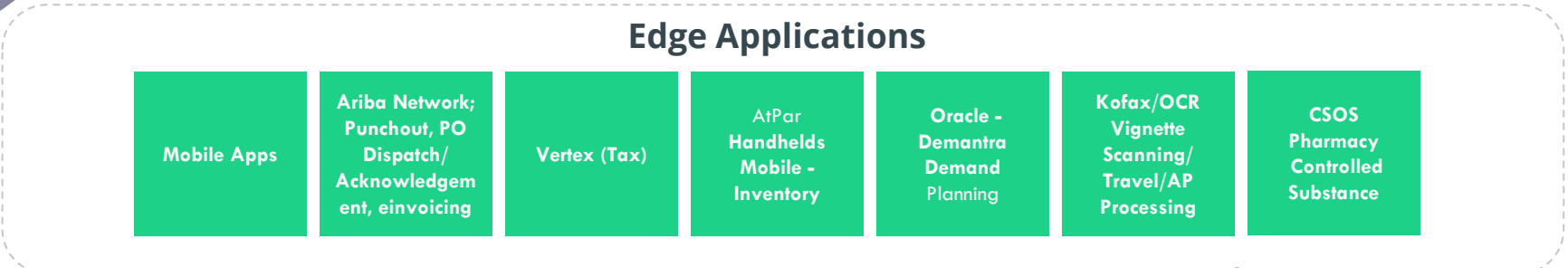
Fin. Data Warehouse (FDW)

- Reporting / Analytics
- Cognos

Kaiser Custom

- POU (Point-of-Use)
- FDA (Funds Disbursement Authorization)
- GL Chartfield Translation Tool

Edge Applications



Oracle Specialized

 **Partner**

Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

 **Expertise in PeopleSoft in North America**

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

 **Expertise in Oracle EPM Cloud in North America**

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

 **Expertise in Oracle Cloud Platform in North America**

SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

 **Education Reseller**

SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

 **Public Sector Addendum**

Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified

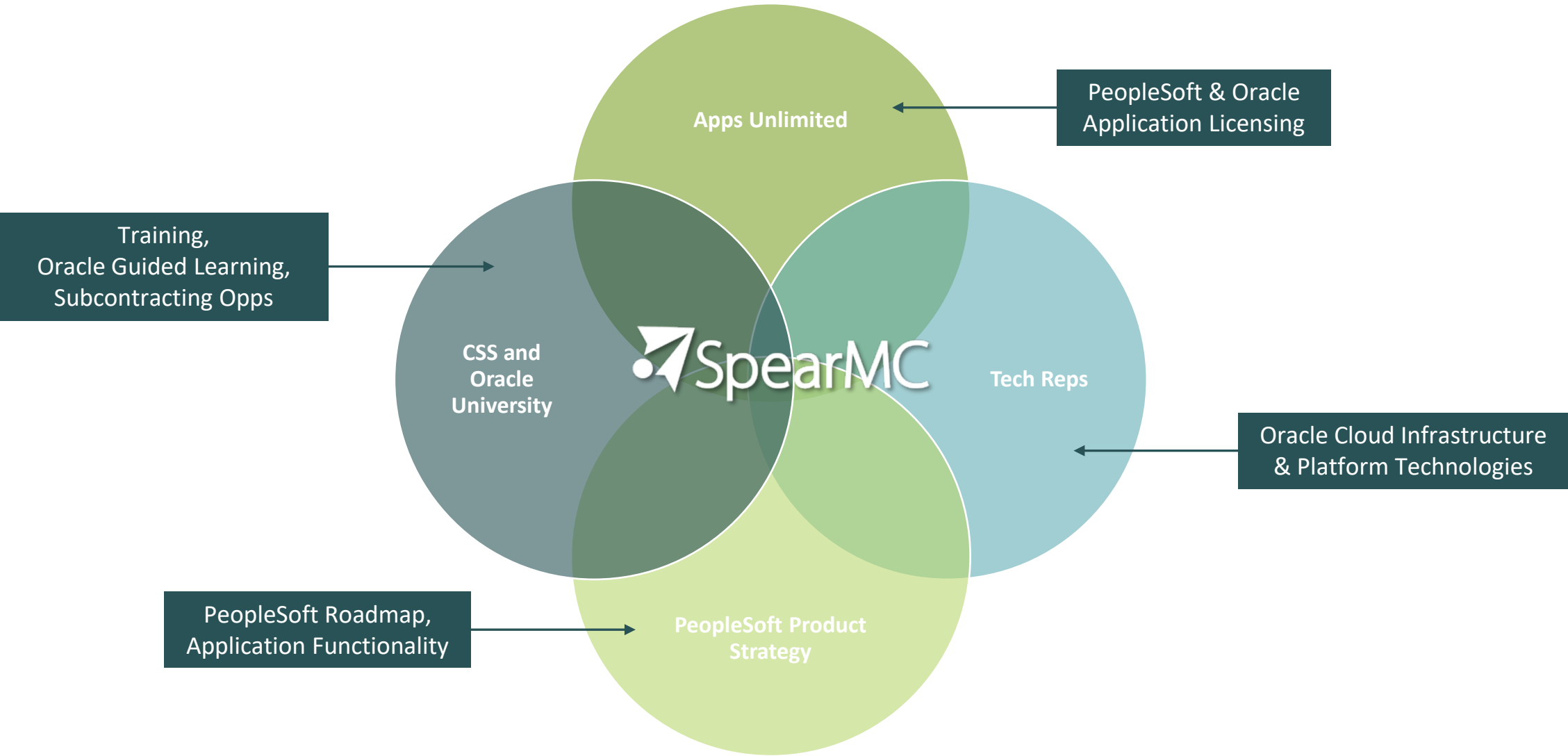


Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest Gartner Market Guide for Oracle Professional Services.



Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



- Managed Services

Application Support
Testing as a Service
System Administration
Infrastructure Hosting

- Consulting Services

Financials and Supply Chain
Test Framework
Human Capital Management
Campus Solutions

- PeopleSoft Training

All-Access Learning Pass
Live Private Training
Oracle Guided Learning
Oracle University Reseller

Oracle PeopleSoft

- Oracle Cloud Platform

OCI Migration
Infrastructure Hosting
Disaster Recovery

- Emerging Technology

Oracle Assessment
Chatbots & Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

- Proprietary Products

PTF Testing Grounds
Grants: LCD/Effort Reporting
Supplier Contracts: Authoring
Lease Admin: GASB 87

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will receive Powerful, Practical Learning Experiences covering PeopleSoft Campus Solutions, Human Capital Management, Financials and PeopleTools:

- Campus Solutions: Advisement, Admissions, Registration, 3C's
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools Bootcamp, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker/REST Web Services
- Reporting: OpenSearch Dashboards (formerly Kibana) and Query

Visit our [website](#) for a full listing of available public courses and free webinars



Scan the QR code to view the full listing of offerings and courses

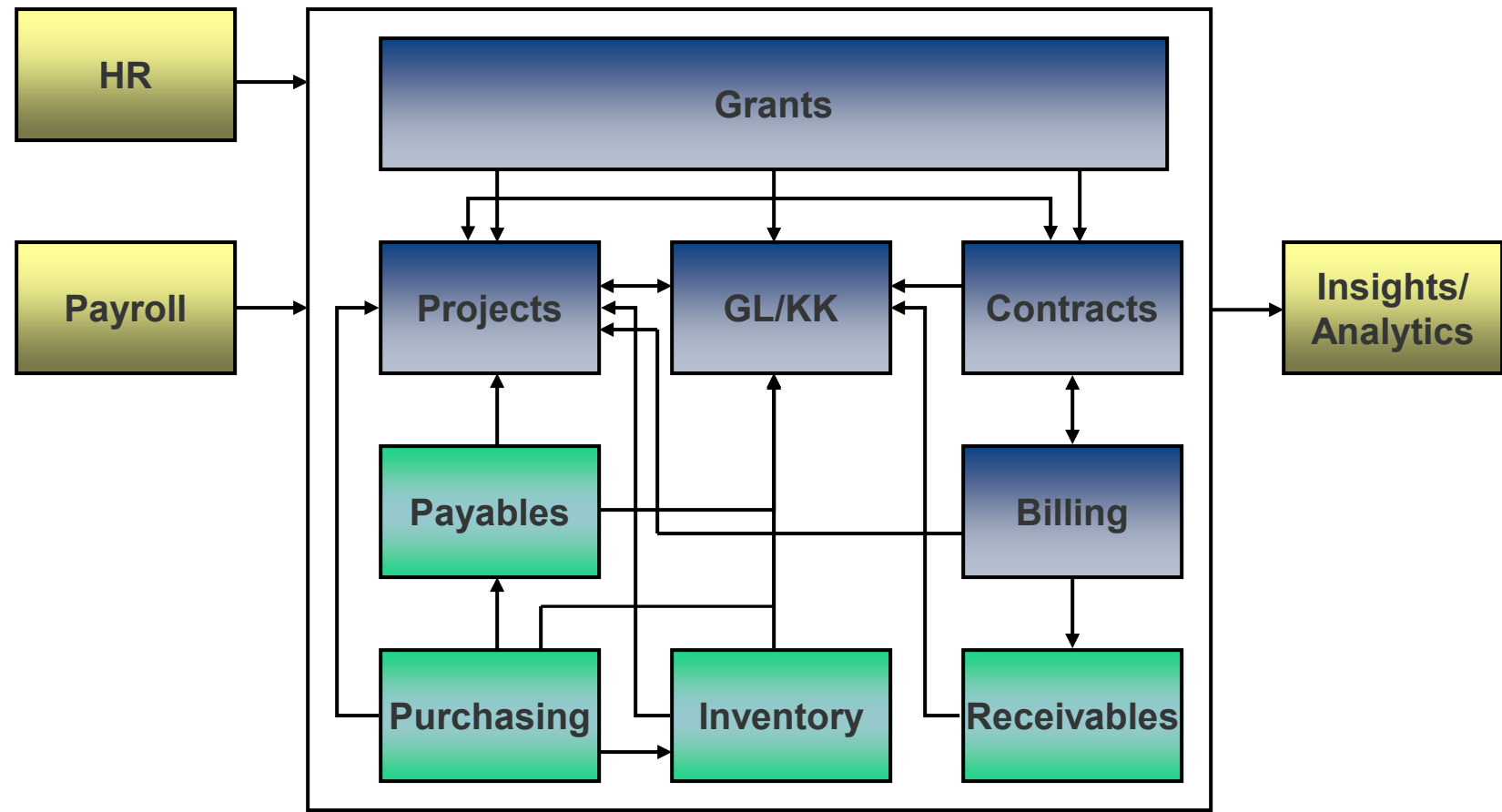
Grants Management Overview

Grants Management Overview

PeopleSoft Grants supports the key business processes that are associated with the administration of sponsored research activities.

- Proposal Preparation
- Proposal Submission
- Protocol Management
- Award Negotiation
- Award Funding
- Project Administration
- Award Administration
- Budget Administration
- Facilities and Administration (F&A) Cost processing
- Bill Creation
- Letter of Credit Processing
- Payment Processing
- Financial Reporting
- Project Analysis
- Award Closeout
- PeopleSoft Grants Workflow

Grants Management Overview



Demo

Grants Proposal/Award

Project Costing Transaction List

Customer Contracts/Billing Manage Contracts

Customer Contracts/Billing Cost Reimbursable Awards Dashboard

Accounts Receivable Collections WorkBench

Kaiser Permanente Case Study

Kaiser Permanente Grants Overview

PeopleSoft Version	PeopleSoft Modules
9.2 PUM Image 43 PeopleTools 8.58.17	Buy to Pay: ePro, PO, IN, eSupplier, Services Pro, AP, eSettlement, Travel & Exp, Sourcing, Supplier Contracts Record to Report: Treasury, GL, GM, AR, BI, CA, Time Reporting Acquire to Retire: AM, LM, PC, KK

First Go-Live for Grants	# of Grants Business Units
2014	9

Types of Funding	Types of Billing/Revenue Recognition
- Federal - State and Local Gov - Foundation/other private - Industry - Internal	- As Incurred - Fixed Amount - Prepaid - ISB Inter-Regional Automated Reimbursement - ICB Internal Sponsors Automated Reimbursement - Internal (e.g., Discretionary Funds, Infrastructure)

Key Benefits of Grants Management

- Integrated solution that allows Federal and Non-Federal Grants Management Life Cycle, Internal and External Reporting, Security and Sox Compliance
- Release of New Futures via PUMS Images, up to each organization on the Implementation Schedule
- Allows organization to standardize Grants processes across regions where possible
- Flexible configuration for a large organization where each Grants region may have a unique setup and state requirements
- Ability to customize when configuration doesn't allow to address a requirement
- Delivered interfaces and Excel to CI to easy load data
- Various reporting options/tools
- Ability to easily extract Letter of Credit billing for draw down
- Ability to tailor invoice formats
- Ability to tailor system billing for various types of billing
- Robust F&A process including Waived F&A and Retroactive F&A corrections
- Various controls and approvals for project transactions (KK, Statuses, Combo Edit, Workflows, WorkCenters, etc.)

What's New/Coming



PeopleSoft RECONNECT Dive Deep 2024

October 28 – 31, 2024

Kaiser Permanente PUM 44-49

Scope

Starting Point:

- The OneLink platform is on PeopleTools 8.60.10 and PUM Image 43

Project Objective:

- Stay current with database, PeopleTools, PeopleSoft Images, new features, security patches, and code fixes
- Maximize use of Automated Testing for System and Integration
- Limit scope of UAT to new feature testing

Scope of 2024 Release will include:

- Apply PeopleSoft images 44-49, adoption and as needed, code retrofit and customization of new features (plus Bug fixes from Image 50)

Description for Proposal Attributes

PUM 46

- Enhanced the description fields on the Key Words pages to accommodate 100 characters

FavoritesMain MenuSet Up Financials/Supply ChainProduct RelatedGrantsSetup GM Proposal Key WordsHomeWorklis

KAISER PERMANENTEOneLinkAllSearchAdvanced SearchAdd

New WindowHelpP

SetIDSHAREKeywordADCT_CHEM_DEP

Key Word Detail

1 of 1

View All

*Effective Date01/01/1900

*StatusActive

+−

*DescriptionAddiction/Chemical Dependency

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

View Attachment Quantity

PUM 46

- ➡ Added visibility to the number of attachments on the milestone, funding, award modifications, certifications and award pages in the Award profile component

Award Funding Resources Certifications Terms Milestones Key Words Funding Inquiry

Award ID	NCA0000011	
Reference Award Number	IHS-1310-08734	Federal Award Identification Number
Title	Prescription Opioid Management (PCORI)	
Long Description	Prescription Opioid Management in Chronic Pain Patients: A Patient-Centered Activation Intervention 155 characters remaining	
Award PI	Campbell,Cynthia	Reporting Role
Sponsor	Patient-Ctred Outcomes Rsrch Inst	
Post Award Administrator		
Purpose	CLINT	
Status	Closed	
Award Type	(Invalid Value)	
Proposal ID	NCA0000011	View Proposal
Version ID	V101	
Start Date	10/01/2014	
End Date	09/30/2018	
	☐ Hold Billing on Unpaid Cost ☐ Hold Revenue on Unpaid Cost	

Configure Project and Activity User Field Labels

PUM 45

► Configure Project and Activity User Field Labels

Favorites ▾

Main Menu ▾

> Grants ▾

> Awards ▾

> Establish Project General Info

> Define Project Activities

> Define Activity General Info

Home

KAISER PERMANENTE

OneLink

Projects ▾

Search

>> Advanced Search

New Window

Help

General Information

Definition

Location

Attachments

Quality

User Fields

Rates >

Project

ADM000025

Description

Sect Chief Sup - Quesenberry

Activity

00001

Description

Billable Activity

User Fields

Reference PC BU

Reference Project Id

Reference Project Prefix

Reference Activity Id

LDGL Activity Suffix

User Currency

Q

Amount 1

Amount 2

Amount 3

Date 1

Date 2

Import Spreadsheets by Bill Source

PUM 44

- Enhance the Billing Interface process to run by bill source in addition to interface ID and business unit. The Bill Source option processes all interface IDs for a specific bill source within a range of business units.

The screenshot shows the Oracle Billing Interface process configuration screen. The breadcrumb trail at the top reads: Favorites > Main Menu > Billing > Interface Transactions > Process Billing Interface. The user is logged in as KAISER PERMANENTE. The interface includes a search bar with a 'Projects' dropdown and an 'Advanced Search' button. Below the search bar, there are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Run Control ID' is set to 'BI_INTFC'. A 'Range Selection' dropdown menu is open, showing three options: 'Interface ID' (selected), 'Business Unit', and 'Bill Source'. To the right of the dropdown, there are two input fields: 'From Interface ID' and 'To Interface ID', both containing the value '45166'. At the bottom, there is a row of buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

Run Control ID: BI_INTFC

Report Manager Process Monitor Run

Range Selection

- ☒ Interface ID
- ☐ Business Unit
- ☐ Bill Source

From Interface ID 45166

To Interface ID 45166

Save Return to Search Previous in List Next in List Notify Add Update/Display

Establish From Email Address

PUM 45

- Enhanced the email that is generated when an invoice is sent to include a from email address. This configured email address can be used instead of the system email address and is configured by business unit or bill type on the Billing Definition. *Note: This feature was already implemented in OneLink as part of Grants Billing Enhancement deployed in April 2022*

Log all Finalization Errors

PUM 48

- Enhanced the Finalization process (BIIVCOOO) to capture all validation errors in the message log. Use the Review Invoice Errors component to review all errors. Use the Standard Billing or the Express Billing components to correct errors found during this process.

Favorites ▾Main Menu ▾> Billing ▾> Review Processing Results ▾> Review Invoice Errors

KAISER PERMANENTE
OneLink

Projects ▾Search

Advanced Search

Add To ▾

NavBar

HomeWorklistSign Out

New Window | Help | Personalize Page

Unit R0201

Invoice NEXT

Invoice Error Missing Currency Rate Type

Errors

1-1 of 1 ▾

<>| View All

Sequence	Error Status	Error Description	Last Update

Save

Return to Search

Notify

View Invoice Approval Chain and Comments

PUM 48

- Enhanced the Billing Inquiry page to view the approval status, departmental approval chain, and comments

Favorites

Main Menu

Billing

Review Billing Information

Details

Home

Worklist

Sign Out

KAISER PERMANENTE

OneLink

Projects

Search

Advanced Search

Add To

NavBar

New Window

Help

Personalize Page

Header - Info 1

Line - Info 1

Unit	R0201	Invoice	INVIU0006066	Pretax Amt	24,479.24	USD	
Status	RDY	Invoice Date	10/10/2024	Cycle ID	MONTHLY		
Type	INT	Source	GM_MRKT	Frequency	Once		
Customer	10000578	SubCust1		SubCust2			
	KP Southern CA R&E IU	To Unit	0801				
Invoice Form	GM_RT_ISB	From Date	09/01/2024	To Date	09/30/2024		
Accounting Date		Pay Terms	000	Pay Method	Check		
Remit To	BOFA	Bank Account	3559				
Sales	GM	Bill Inquiry Phone	DOR1				
Credit	KFRI	Collect	KFRI				
Billing Specialist	DOR10	Billing Authority	DFLT				
	Allan H. Chu	Billing Authority					

Go to:

Summary

Header Info 2

Commit Cntrl

Address

Copy Address

Approvals

Notes

Bill Search

Line Search

Header - Info 1

Page Series

Prev

Next

Return to Search

Previous in List

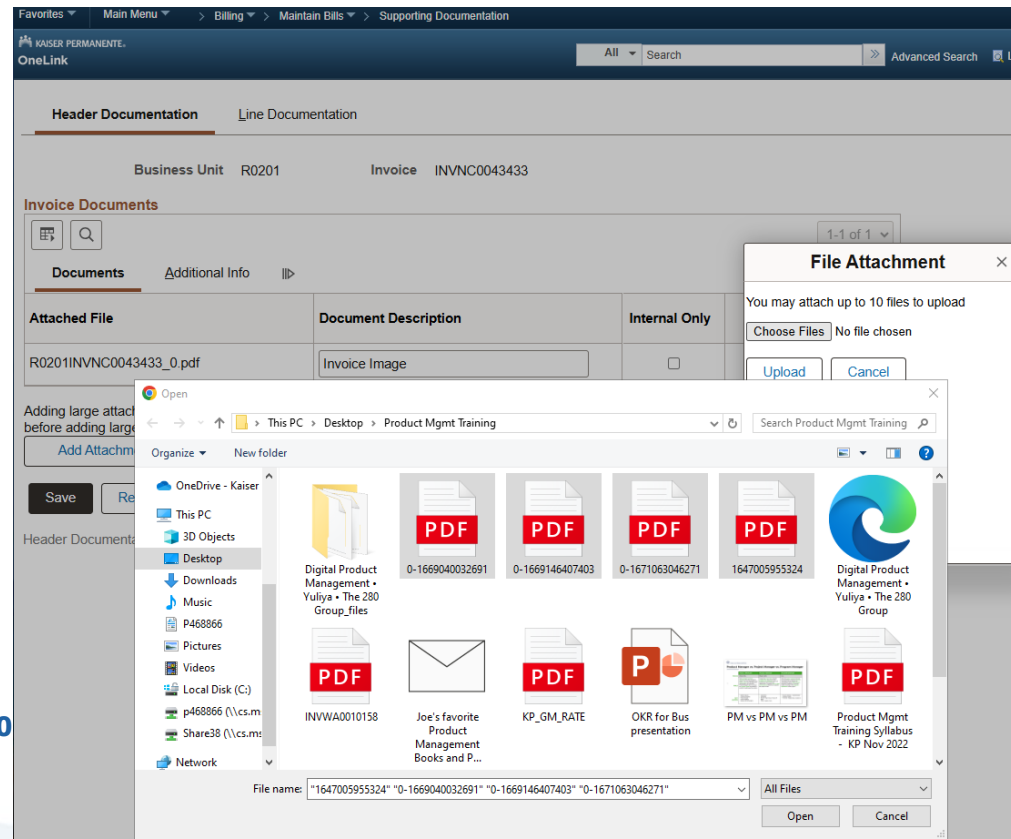
Next in List

Notify

Refresh

Multiple Attachments & Attachment Limit in Billing PUM 49

- ➡ PeopleSoft Billing enhances the Supporting Documentation page to use the Attachment Framework, which allows one or more attachments to be added at once. The system displays an error message if you try to load more than the number of attachments specified on the Installation Options



Post All Business Units

PUM 45

- Enhanced the Receivables Update process with an option to collectively process all business units that have transactions to post.

Favorites

Main Menu

Accounts Receivable

Receivables Update

Request Receivables Update

KAISER PERMANENTE

OneLink

All

Search

Advanced

Receivable Update Request

Options

Run Control ID: TEST

Report Manager

Process Monitor

Run

☒ Post All Business Units

Process Request Parameters

Q

|

<

>

1 of 1

>

>

|

View All

*Group Unit

R0801

Q

+

-

Process Frequency

Don't

▼

*High Balance Basis Date

Run Date

▼

*Accounting Date From

01/01/1900

📅

*Accounting Date To

10/25/2024

📅

Transaction Types

☒ ALL

☒ Pending Items

☒ Payments

☒ Maintenance Transactions

☒ Direct Debits

☒ Drafts

☒ Transfers

☒ Unpost Transactions

☒ Overdue Charges

Add Attachment Directly to an Item

PUM 46

➡ Enhanced PeopleSoft Receivables to add attachments directly to the Items.

Favorites

Main Menu

Accounts Receivable

Customer Accounts

Item Information

View/Update Item Details

KAISER PERMANENTE

OneLink

All

Search

Advanced Search

Unit R0201

Customer 10000002

Abbott Laboratories

Item ID INVNC0012978

Line

Days Late 31

Status Closed

Accounting Date 10/30/2014

Balance 0.00 USD

Billing Unit R0201

Detail

Entry Type GM_IN

Original Amount 2,780.00 USD

Entry Reason

Payment Plan

AR Dist Info GM_AR

Discount Options

Customer Relations

Due Date 10/30/2014

Due Days

Terms IMMED

Discount Days

Discount Amount 0.00

Date

Discount Amount 1

Date 1

☐ Always Allow Discount

As Of Date 10/30/2014

Posted 12/04/2014

☐ Dispute

Reason

Date

Dispute Amount

☐ Deduction

Reason

Date

☐ Doubtful

☐ Collection

Code

Date

Analyst KFRI

Collector KFRI

Sales Person GM

AR Specialist

Kaiser Foundation Research Institute

Kaiser Foundation Research Institute

Grants Management

Payment/Draft Options

Other Options

Payment Method Check

Draft Type

Direct Debit Profile ID

☐ Preapproved?

☐ Create Document?

☐ One Item per Draft?

☒ Revaluation Flag

☒ Available for Netting

Item Creation/Update Details

Created On 07/17/2015 8:39AM

Last Modified On 10/25/2024 1:25PM

Created By PPLSFT

Modified By P468886

Direct Journal Enhancements

PUM 47

- ➡ Added the option to copy direct journals from existing journals. Also, added the ability to mark direct journals as complete or budget check direct journals en masse.

Favorites ▾Main Menu ▾>Accounts Receivable ▾>Payments ▾>Direct Journal Payments ▾>Copy Direct Journal

KAISER PERMANENTE
OneLink

Deposit Unit R0201Deposit ID 1112

Direct Journal Action

☒ No Action

☐ Copy Direct Journal

Number of Copies 1Create Direct Journals

Copy Results

<<1-1 of 1>>View All

Sequence	Copy Deposit ID	Go to Direct Journal Acctg Entries
1	4231	Go to Direct Journal Acctg Entries

Save

Return to Search

Previous in List

Next in List

Notify

PUM 50-51

Award Milestones Notifications

- Notifications for award milestones coming due and notifications for changes to proposal status have been migrated to the Notification Composer. Delivered through PeopleSoft Enterprise Components, Notification Composer, provides a centralized framework to create and manage all your notifications within PeopleSoft applications. Notification Composer streamlines multiple notification methods and frameworks into a single approach.

Award Milestones Notifications

PUM 51

Compose Notification

Search for Notifications

[Add Notification](#)

Search Criteria

Notification ID

Notification Category

Business Process

Owner ID

Grants Management

Notification Description

Status

Active

PeopleTools Notification Name

Priority

Search Clear

Search Results

Notification ID							Notification Description		Notification Category		Status	Business Process		PeopleTools Notification Name		Priority
GMPProposalOnFinAprvGMRqstrHdr							Proposal Component, On Final Approval, Header, Requester		Approval Workflow		Active	Grants Proposal		Grants Proposal - Requester		Medium
GMPProposalOnFinDenyGMRqstrHdr							Proposal Component, On Final Denial, Header, Requester		Approval Workflow		Active	Grants Proposal		Grants Proposal - Requester		Medium
GMPProposalOnReasgnGMAprvrsHdr							Proposal Component, On Reassign, Header, Approvers		Approval Workflow		Active	Grants Proposal		Grants Proposal - Approver		Medium
GMPProposalPshBkGMAprvrsHdr							Proposal Component, Push Back, Header, Approvers		Approval Workflow		Active	Grants Proposal		Grants Proposal - Approver		Medium
GMPProposalRtAprvGMAprvrsHdr							Proposal Component, Route for Approval, Header, Approvers		Approval Workflow		Active	Grants Proposal		Grants Proposal - Approver		Medium
GrantsAwardMilestone							Grants Award Milestone		Applications Notification		Active	Grants Award Milestone		Grants Award Milestone		Medium
GrantsProposalStatus							Grants Proposal Status		Applications Notification		Active	Grants Proposal Status		Grants Proposal Status		Medium

Assistance Listing Number

PUM 51

- Enhanced Grants pages to update the terminology from CFDA (Catalog of Federal Domestic Assistance) to ALN (Assistance Listing Number). Enhanced the award and proposal to display the prime sponsor when applicable. Enhanced sponsor general information to identify a headquarters location.

Assistance Listing Number

PUM 51

Award Profile

Award

Funding

Resources

Certifications

Terms

Milestones

Key Words

Funding Inquiry

Award ID

CON000000000086

Reference Award Number

APEXSYS01

Federal Award Identification Number

Title

Cardiovascular Genome-Phenome Study

Long Description

Cardiovascular Genome-Phenome Study

219 characters remaining

Award PI

Tran, Corrine

Reporting Role

Sponsor

Prime Sponsor

Post Award Administrator

Chae, Kevin

Purpose

BARE

Status

Accepted

Award Type

Clinical Trial

Proposal ID

CON000000000086

Version ID

V102

Start Date

01/01/2016

End Date

12/31/2016

☐ Hold Billing on Unpaid Cost

☐ Hold Revenue on Unpaid Cost

View Proposal

View Contract

Contract Rates

Additional Information

Grant Administrator

Sponsor Website

ALN

Maintain Attachments (0)

ALN

Award ID

CON000000000086

Reference Award Number

APEXSYS01

ALN

93.313

Program Title

NIH Office of Research on Women's Health
Department of Health and Human ServicesNational Institutes of Health

Prime

☒

+

-

Return To Award Profile

Assistance Listing Number

Search in Menu

Award Profile

Award

Funding

Resources

Certifications

Terms

Milestones

Key Words

Funding Inquiry

Award ID

CON0000000000028

Reference Award Number

Federal Award Identification Number

Title

The effects of insulin on laboratory rats

Long Description

The effects of insulin on laboratory rats with an insatiable appetite for chocolate

171 characters remaining

Award PI

Schumacher,Kenneth

Reporting Role

Sponsor

National Institutes of Health

Prime Sponsor

Post Award Administrator

Purpose

BARE

Status

Accepted

Award Type

Grant

ALN

Proposal ID

CON0000000000028

View Proposal

Version ID

V101

Start Date

10/01/2004

End Date

09/30/2009

☐ Hold Billing on Unpaid Cost

☐ Hold Revenue on Unpaid Cost

View Contract

Contract Rates

Additional Information

Grant Administrator

Sponsor Website

Maintain Attachments (0)

Primary Project PI

Schumacher,Kenneth

Associated Project

1-1 of 1

PC Business Unit	Project	Description	Project Start Date	Project End Date
EGV05	000000000000163	The effects of insulin on labo	10/01/2004	09/30/2009

Go To:

Sponsor

Protocols

Attributes

Department Credit

Notepad

Award Modifications

Supplemental Data

Awards Dashboard - ALN

PUM 51

- ➡ Enhanced Grants Cost Reimbursable Awards Dashboard to update the terminology from CFDA (Catalog of Federal Domestic Assistance) to ALN (Assistance Listing Number).

Awards Dashboard - ALN

PUM 51

Cost Reimbursable Award Financials

Open In OpenSearch Dashboards

Search

DQL

Refresh

Award PI: Young,M x

Award End Date: 2024-10-14T14:08:38Z to 2034-10-14T14:08:38Z x

+ Add filter

Business Unit and Currency are mandatory filters

Business Unit*

Currency*

Award Title

Award ID

Sponsor

Principal Investigator

Award Department

Contract Administrator

Contract Status

Fiscal Year

Accounting Period

ALN

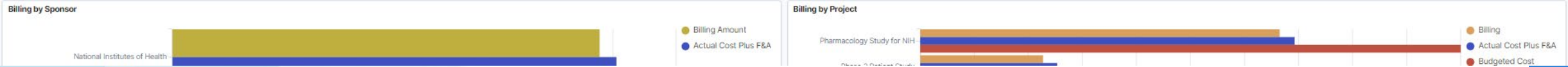
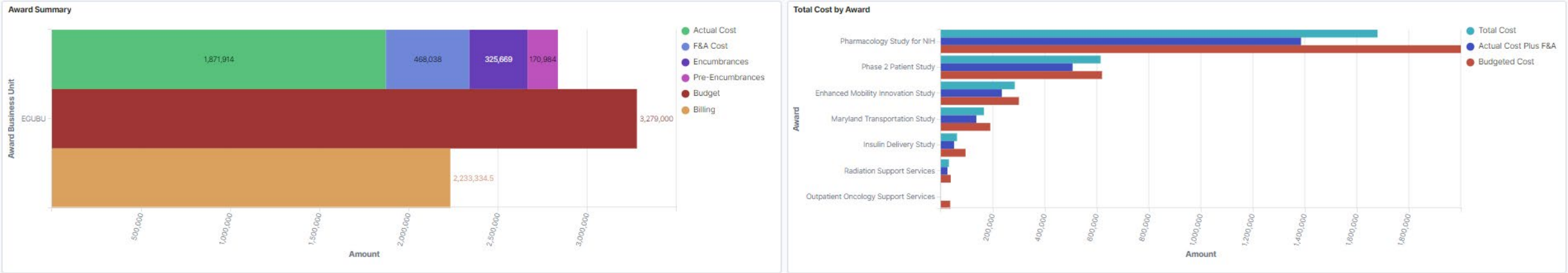
Apply changes

Cancel changes

Clear form

US Dollar

All visualizations use the Project Business Unit Currency



Grants Roadmap

Resources

Roadmap

P-049834

PeopleSoft Grants and Project Costing Update

Presented by: Joe Willever, Oracle America, Inc

Date/Time: Wednesday, October 30, 2024, 5:00 pm ET

Come to this session to learn about the recent updates to Grants, Customer Contracts and Project Costing. We will demo a new activity guide to update Grants and Contracts across the organization, a comprehensive Award Portal Insights dashboard, and new content added to the Projects and Contracts WorkCenters. This session is CPE Eligible- NASBA Eligible



PeopleSoft

 [Products](#) [Cloud](#) [Customers and Innovation](#) [Partners](#) [Resources](#)

 **Help and Training**
Help Center (PeopleBooks)
Training Center
Spotlight Series
Videos

 **Blogs**
Applications Strategy
Legislative Updates
Technology

 **Planning Tools**
Cumulative Feature Overview (CFO) Tool
PeopleSoft Roadmap (Planned Features and Enhancements)
Campus Solutions Update Image Schedule
FSCM Update Image Schedule
HCM Update Image Schedule

 **Contact Oracle**
Sales and Licensing
Support

 **About PeopleSoft**
Vision and Strategy
News

Grants FFR

Roadmap

- ▶ The Federal Financial Report (FFR) is a standard report summarizing the expenditure of funds on federal grant awards. The report is submitted at least annually and includes an accounting of program cost incurred, indirect expenses, funds received, funds remaining, and program income generated.
- ▶ We plan to enhance the FFR reporting process by providing customers with output that can be loaded into the FFR form. With this approach, we plan to generate a file with information tags that can be read into the FFR form. Customers will likely require use of Adobe Professional to read the information tags generated by PeopleSoft and used in the PDF file. This approach provides flexibility to customers who may want to include additional information in the form and reduces cost of maintenance if the report changes in the future.

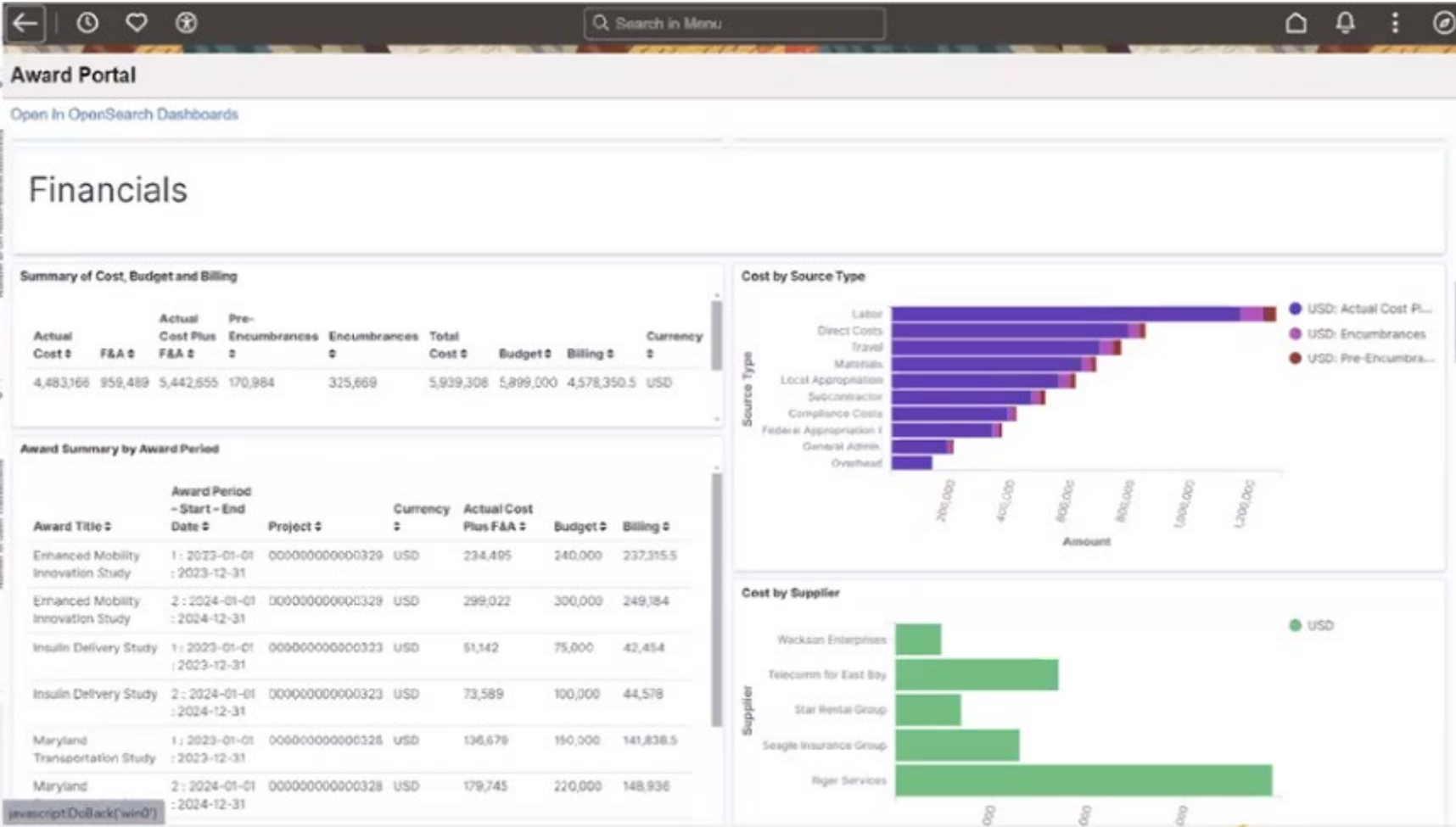
Grants Award Portal Insights

Roadmap

- ▶ PeopleSoft Insights provide organizations an interactive dashboard for reviewing information. We plan to provide Grants users a comprehensive Award Portal Dashboard to review the status of the awards assigned to them. The Award Portal may include information from several sources of **financial** and **non-financial Information**. From a financial perspective, the Award Portal may include award cost, billing, and budget information from project costing, fixed amount billing and revenue from sponsored contracts, and open receivables and collections from accounts receivable. Non-financial information may include the status of **milestones** coming due or overdue, recent funding and award modifications, a status of **proposals** and other approvals in progress and access to the award team and award subrecipients. Targeted to Principal Investigators and support staff this dashboard would eliminate spreadsheets, word documents, emails, and other offline tools to review a status of your current awards.

Grants Award Portal Insights

Roadmap



CA & GM: Contract Award Update Guide

Roadmap

- Fluid activity guides provide users a guided process to complete a task. Widely popular, activity guides are common throughout PeopleSoft. Project Costing delivered a Project Update Wizard in Update Image 42. The Project Update Wizard enables users to update project information such as project manager, team, and end dates en masse.
- We are planning to create a similar capability for Contract and Award updates. This new capability would be available to organizations who use the Customer Contract application and/or Grants application. It would allow contract administrators and award administrators to update the following information en masse, across the organization in a single action.
 - End date on the award, contract line, project and activity
 - Principal investigator (PI) and Co-PI
 - Post award administrator
 - Award status
 - Institution department and contact
 - Contract administrator
 - Billing specialist
 - Billing and revenue plan hold status



Questions?

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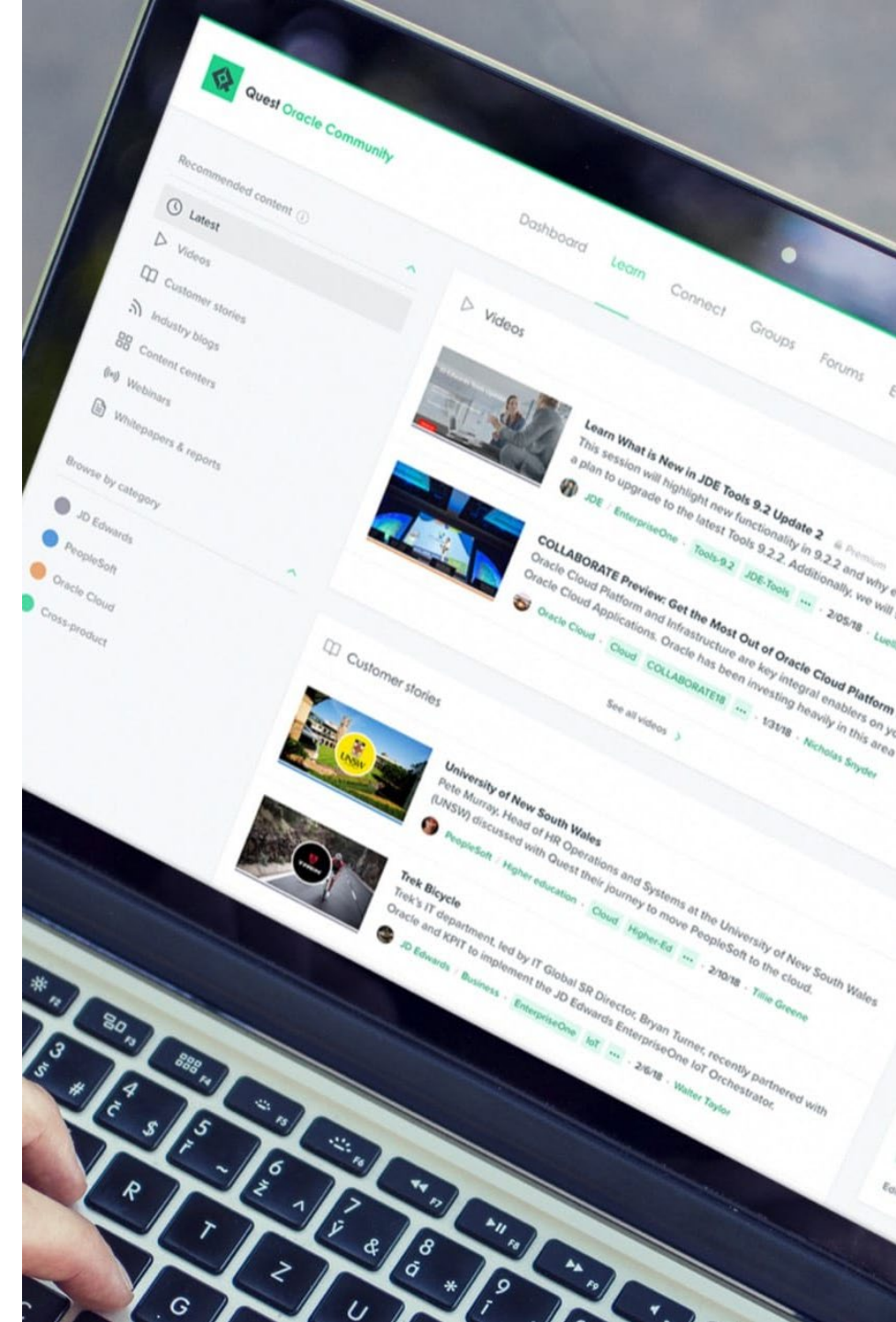
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June 10 – 13, 2025

The Venetian in Las Vegas, NV



Quest Experience Week PeopleSoft Day

December 10, 2024

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Appendix

SpearMC Sessions

Date	Time (ET)	Session Title	Presenter	Session #
10/29	12:00 PM	Business Process Weaver – Automation please!	Jessica Mann Yuliya Ivanova	P-049639
10/29	1:30 PM	Demo Enhancing Internal Controls Using a Segregation of Duties Analyzer	Randy Johnson	DEMO
10/29	1:45 PM	Learn PeopleSoft Today, Invest in Your Future with PeopleSoft All Access Learning Pass. Product Demonstration for PeopleTools, FSCM, HCM and Campus Solutions.	Marcus Bode Susan Caranante	DEMO
10/29	2:30 PM	A Fresh Look at PeopleSoft Grants Management	Jessica Mann	P-049641
10/29	3:45 PM	Customer Panel - Oracle Guided Learning	Cameron McClurg	P-049755
10/30	12:00 PM	Exploring PeopleSoft PICASO: A Guided Demo of Chatbot Capabilities	Joe Finlinson	DEMO
10/30	1:15 PM	Achieve a Seamlessly Integrated Time, Absence, Payroll Management Solution using PeopleSoft HCM	Logesh Balasubramaniam	P-049960
10/30	3:00 PM	PeopleSoft Automated Testing and PTF Accelerators at NDUS and State of ND	Tarun Amuthan	DEMO
10/30	3:45 PM	PeopleSoft Fluid Delegation Framework Best Practices	Randy Johnson	P-049664
10/30	5:00 PM	Taking PeopleSoft Chatbots to the Next Level with Oracle Guided Learning (OGL)	Tarun Amuthan	P-049649
10/31	11:00 AM	Demo Using the Powerful Fluid Navigation Collections Framework	Logesh Balasubramaniam	DEMO
10/31	11:15 AM	OGL: Real Time Guided Processing for Students, Applicants, Employees, Suppliers & Customers	Cameron McClurg	DEMO
10/31	2:30 PM	PeopleSoft Match Exception Collaboration Center - Real World Lessons Learned!	Randy Johnson	P-049663

PeopleSoft RECONNECT Dive Deep 2024

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October 28 – 31, 2024

2024 Training Calendar

Date	Session Title
Nov 4	PeopleSoft 9.2 Query Basic & Intermediate for HCM
Nov 5	PeopleSoft 9.2 Query Advanced for HCM
Nov 7	PeopleTools 8.59-8.61 OpenSearch Dashboards
Dec 10-11, 17-18	PeopleTools 8.59-8.61 System Administration: Maintenance and Troubleshooting

Visit our [website](#) for additional details

2025 Training Calendar

Date	Session Title
Jan 22	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
Jan 23	PeopleSoft 9.2 Query Advanced for FSCM
Feb 19	PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions
Feb 20	PeopleSoft 9.2 Query Advanced for Campus Solutions

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