

SESSION #10737

PeopleSoft Grants Portal - Overview and Tips on Rolling Out the Grants Portal

Meet the Team



Ron Lujan

Southern Methodist University
Director of ERP



Jessica Mann

SpearMC
Managing Director

Session Overview

The Grants Portal was developed to provide PIs, departments, and grants support staff insight into awards. The portal provides access to financial (budget, commitment, actual), compliance, resource, and schedule information related to awards and provides a central launching point to navigate through the PeopleSoft Grants solution. Come learn about the Portal features as well as lessons learned on implementing the tool.

Agenda

- Introductions
- Grants Portal Overview
- Grants Portal Configuration Steps and Security
- Batch processing
- SMU Grants Portal Overview
- Tips and Lessons Learned

About SMU[®]

Southern Methodist University

- Founded in 1911
- Robert Hyer – First President
Physicist from Southwestern University
Sent 1st radio transmission in the US
- Dallas Hall – first building on campus



About SMU[®]

Campus Facts

- 234 Acres
- Located between University Park, Highland Park and Dallas
- Top 5 "Most Beautiful Campuses"
- George Bush Presidential Library
- Meadows Museum of Art
- Taos Campus



About SMU

Today

- ~12,000 students
- 6,500 undergrad, 5,500 grad
- Student to Faculty 11:1
- \$1.664 Billion Endowment
- Tuition \$62k/year
- US News and World Report - #66
- Currently R2 - R1 Aspirant
- 8 Schools:
- Dedman, Cox, Lyle, Meadows, Simmons, Dedman Law, Perkins, Moody
- 32 PhD Programs
- Guildhall - Top Rated Video Game Design Program



About SMU[®]

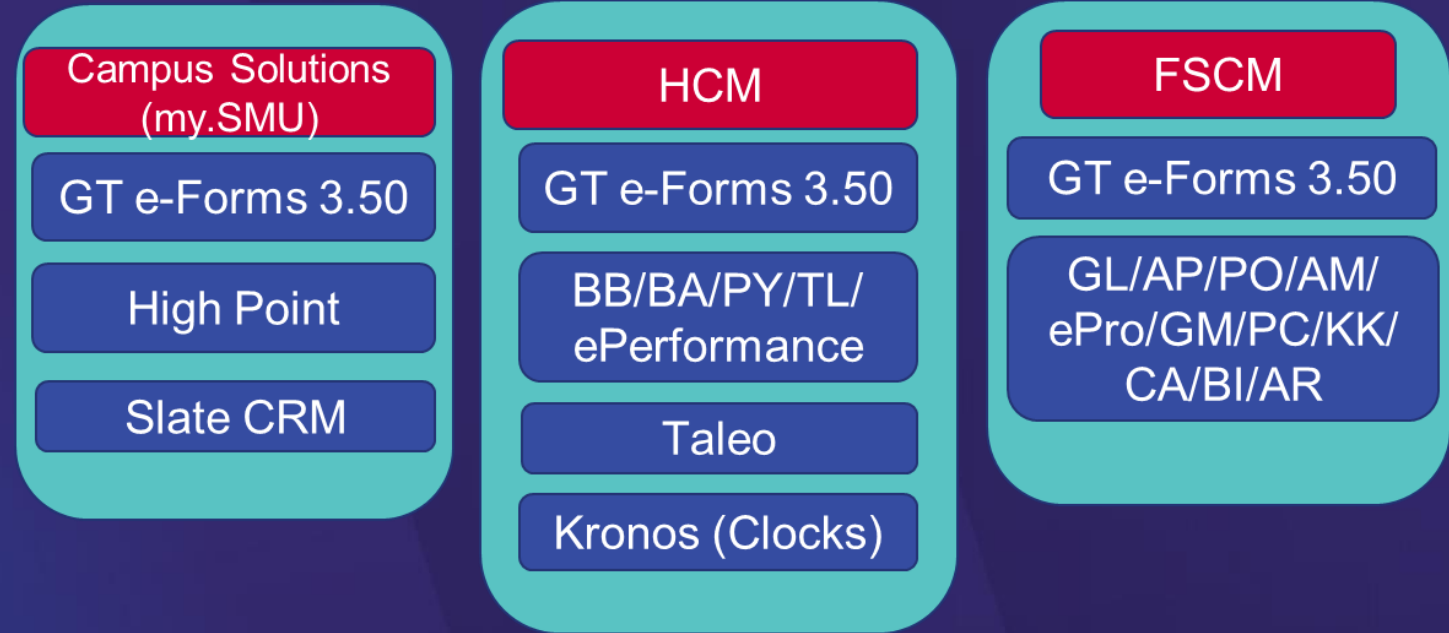
High Performance Computing at SMU

	ManeFrame III (2023)	NVIDIA DGX SuperPOD (2022)
Computational Ability	1000 TFLOPS	1,644 TFLOPS
Number of Nodes	200	20
CPU Cores (AVX2)	25,600	2,560
Total Accelerator Cores	0	1,392,640
Total Memory	112 TB	52.5 TB
Node Interconnect Bandwidth	200 Gb/s	10x200 Gb/s
Work Storage	3.4 PB	768 TB (Shared)
Scratch Space	3.4 PB	750 TB
Archive Capabilities	No	No
Operating System	Ubuntu 22.04	Ubuntu 20.04
GPUs	None	160 Nvidia A100s



About SMU®

- Centralized IT (2015)
- CIO – Dr. Michael Hites (2017)
- ~150 Staff
- On-Prem Data Center
- Microsoft/PeopleSoft/Oracle Shop
- ERP Team (6 Developers, 7 Bas)
- PeopleSoft 9.2 across the board
- Fluid across the board
- Unified Nav
- Oracle DB/PTools 8.59



Recognition and Specializations

Oracle Specialized

ORACLE | 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.

ORACLE | Expertise in PeopleSoft in North America

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

ORACLE | Expertise in Oracle EPM Cloud in North America

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

ORACLE | 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.

ORACLE | 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.

ORACLE | 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



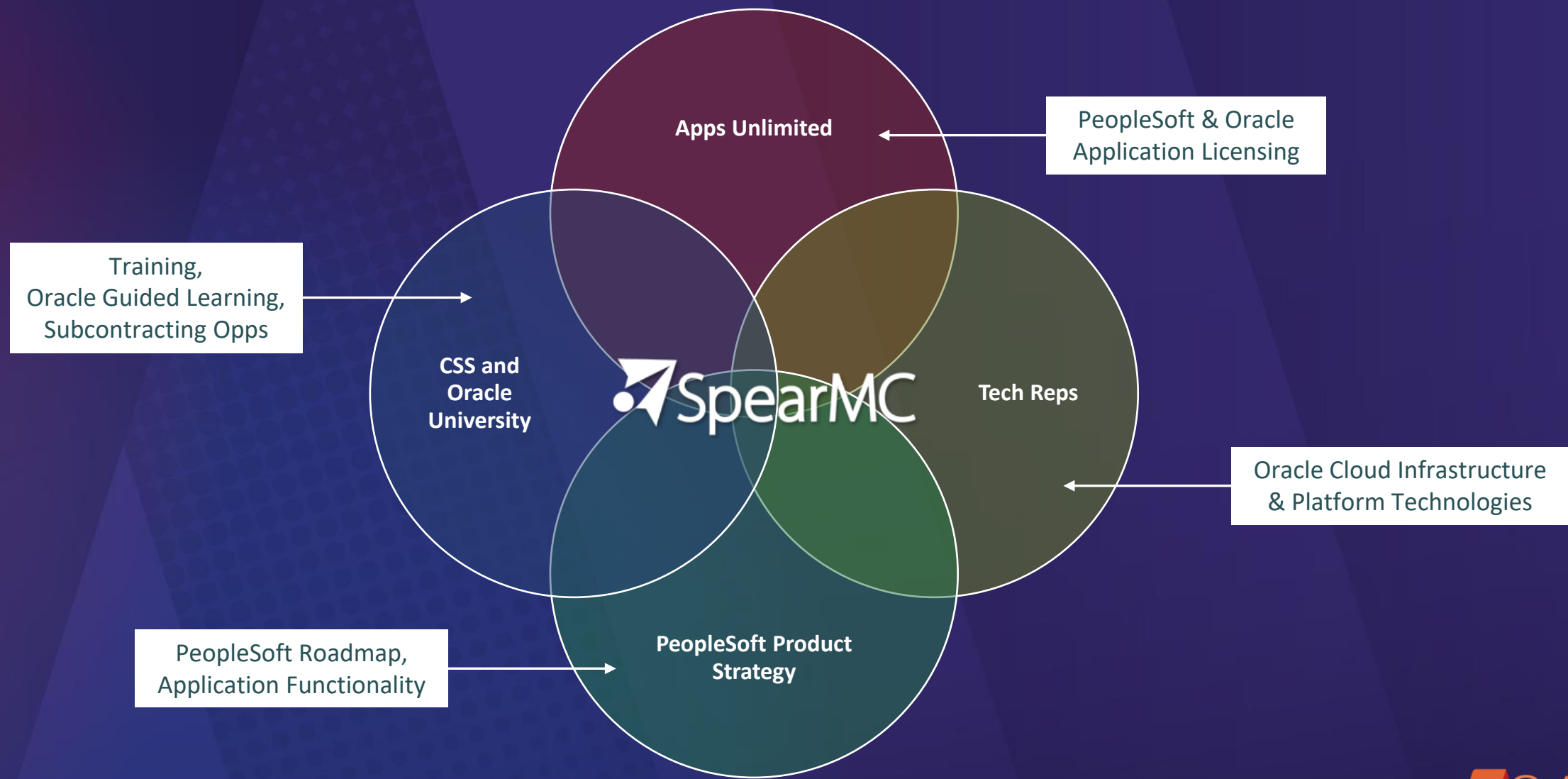
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest 2023 Gartner Market Guide for Oracle Professional Services.

SpearMC Strategy: Positioning with Oracle



Products and Services

- 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 and Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

- Proprietary Products

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

PeopleSoft Training Opportunities

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

E&I Cooperative Services

Simplify Procurement of PeopleSoft ERP Services and Training



Key Benefits

- SpearMC Consulting is the exclusive PeopleSoft partner available on the E&I contract
- Avoid costly and lengthy RFP cycles. The E&I contract was *competitively bid* and complies with your jurisdiction's procurement rules
- Membership for educational institutions to join the E&I Cooperative is at no cost to the institution
- Visit our [website](#) to learn more



Scan the QR code to
determine membership

HEUG Sponsor since 2014



Poll 1

- What are the main tools you use for PI/PM Grant Reporting?

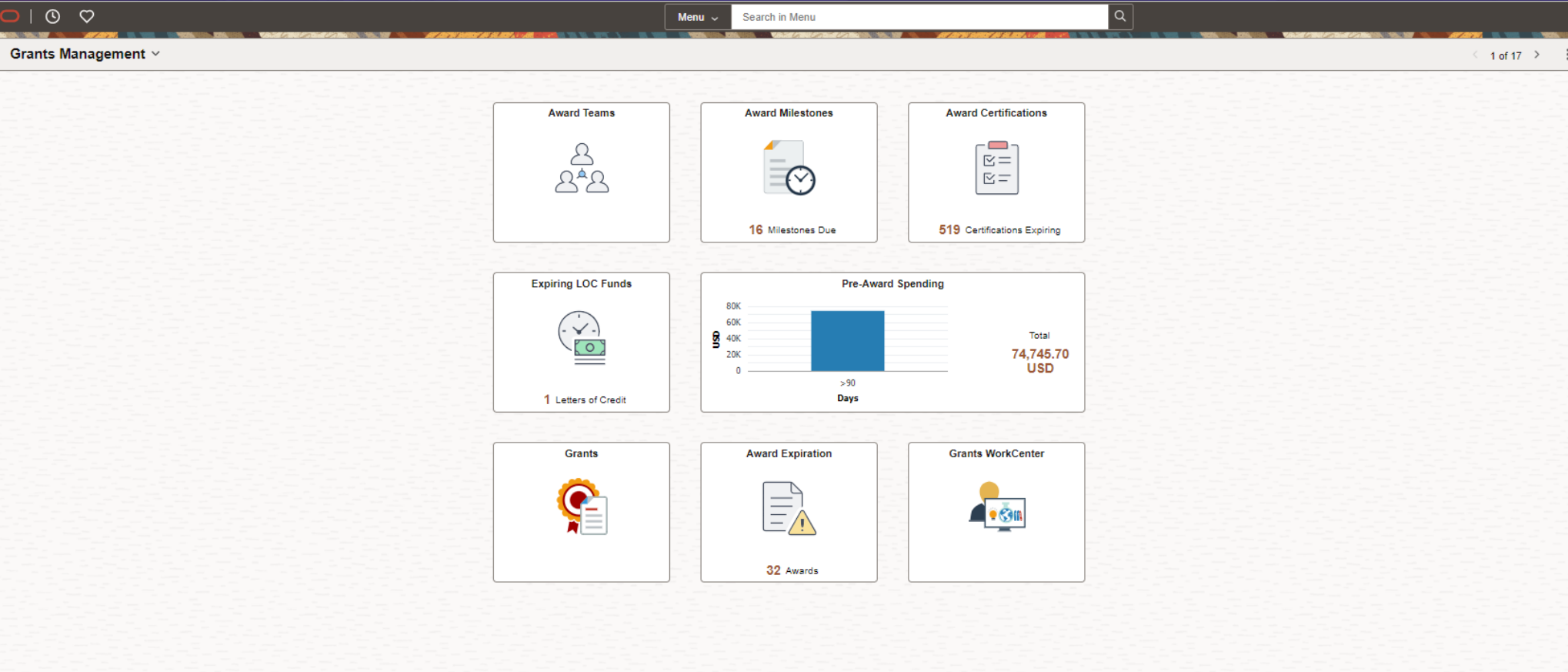
Poll 2

- Do you have any forecasting tools for Grants?

Overview

- The PeopleSoft Grants portal is a central navigation page in PeopleSoft Enterprise Grants for award and project pages. The portal is a central launching point to navigate through the PeopleSoft Grants solution. It provides links to key grant management-related features and enables users to drill down to the details of transactions and documents.
- The Grants portal enables principal investigators (PI) and project managers (PM) to access information about sponsored project efforts. The portal provides PIs and PMs immediate insight into essential information regarding awards so that they can manage fiscal responsibilities and work more productively when interacting with the PeopleSoft Grants solution. The portal provides access to financial (budget, commitment, actual), compliance, resource, and schedule information that is related to proposals and awards.

Overview



Overview

← | 🕒 | ❤️

🔍 Search in Menu

Grants LifeCycle

🏠 Manage My Awards ^

Grants Portal Award Summary

Award Profile

Project Budgets

Review Award Transactions

📁 Manage My Proposals v

📄 Award Billing v

📄 Award Closeout v

📄 Grants Reporting v

📄 Grants Center v

📄 Grants WorkCenter

Award Summary

Hello, Kenneth Schumacher You have 0 new items in your wishlist.

Last Process Date/Time 01/11/2024 8:10:12AM

To change your search criteria, click Set Search Criteria.

Set Search Criteria

Refresh

Maximum Rows to Retrieve 50

Financial Calculating Option ⓘ

Balances Both ▾ ☒ Include FA

Budget Period From 🔍 Through 🔍 Activity 🔍

Date Selection As of Date ▾

Burn Rate Indicator

▼ Potential Under Spending

● Average Rate Spending

■ Potential Over Spending

Search Results

1 of 2

Detail

🔍

22-24 of 50

View All

Demographics

Financial

Compliance

		Award ID↑	Short Title	Primary Project	Project Title	Award Begin Date	Award End Date	Sponsor	Reference Number
☒	▼	CON000000000028	The effects of insulin on laboratory rats	000000000000163	The effects of insulin on labo	10/01/2004	09/30/2009	National Institutes of Health	
☒	▼	CON0000000000179	Grants Demo	000000000000322	Grants Demo	04/01/2023	03/31/2025	National Cancer Institute	1 R01 CA2101
☒	▼	CON0000000000180	Generate Award Example	000000000000323	Generate Award Example	04/01/2023	03/31/2025	National Cancer Institute	

Deselect All

Total Amount of Selected Items

Selected	50	Expended	171,647.92	Invoiced	676,027.07
Funded	4,253,223.00	Encumbered	0.00	Received	10,677.07
Budgeted	4,253,223.00	Pre-Encumbered	0.00	Unpaid	665,350.00
		Remaining Balance	4,081,575.08		Update Total Amount

Overview

Grants Lifecycle

Manage My Awards

Grants Portal Award Summary

Award Profile

Project Budgets

Review Award Transactions

Manage My Proposals

Award Billing

Award Closeout

Grants Reporting

Grants Center

Grants WorkCenter

Award Summary

Hello, Kenneth Schumacher

You have 0 new items in your workload.

Last Process Date/Time 01/11/2024 8:10:12AM

To change your search criteria, click Set Search Criteria.

Set Search Criteria

Refresh

Maximum Rows to Retrieve 50

Financial Calculating Option

Burn Rate Indicator

Search Results

Detail

Demographics

Financial

Compliance

Award ID

APPROACH1

APPROACH1A

APPROACH2

Deselect All

Total Amount of Selected Items

Selected	50	Expended	171,647.92	Invoiced	676,027.07
Funded	4,253,223.00	Encumbered	0.00	Received	10,677.07
Budgeted	4,253,223.00	Pre-Encumbered	0.00	Unpaid	665,350.00
		Remaining Balance	4,081,575.08	Update Total Amount	

Grants Portal Award Search

User Saved Search

Search

Clear

Public

Save Search Criteria

Delete Saved Search

Award Number

Award Status Equal To

Award Type Equal To

Business Unit Equal To EGV05

Award ID Equal To

Title Equal To

Ref Awd # Equal To

Keyword Equal To

Award Responsible Parties

Sponsor

Date

Balance

Return

Overview

← | 🕒 | ❤️

🔍 Search in Menu

Grants LifeCycle

Manage My Awards

Grants Portal Award Summary

Award Profile

Project Budgets

Review Award Transactions

Manage My Proposals

Award Billing

Award Closeout

Grants Reporting

Grants Center

Grants WorkCenter

Award Summary

Hello, Kenneth Schumacher

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Last Process Date/Time 01/11/2024 8:10:12AM

To change your search criteria, click Set Search Criteria.

Set Search Criteria

Refresh

Maximum Rows to Retrieve 50

Financial Calculating Option ⓘ

Balances Both

Include FA

Budget Period From

Through

Activity

Date Selection As of Date

Recalculate

Burn Rate Indicator

Potential Under Spending

Average Rate Spending

Potential Over Spending

Search Results

1 of 2

Detail

Demographics Financial Compliance

		Award ID↑	Funded	Budgeted	Expended	Encumbered	Pre Encumbered	Remaining Balance	Invoiced	Received	Unpaid	Burn Rate	Gr
☒	▼	CON000000000026	210,500.00	210,500.00	2,200.00	0.00	0.00	208,300.00	0.00	0.00	0.00	-99.00	KU
☒	▼	CON0000000000179	476,000.00	476,000.00	9,617.07	0.00	0.00	466,382.93	5,617.07	5,617.07	0.00	2.00	Gr
☒	▼	CON0000000000180	432,223.00	432,223.00	0.00	0.00	0.00	432,223.00	0.00	0.00	0.00	0.00	Gr

Deselect All

Total Amount of Selected Items

Selected	50	Expended	171,647.92	Invoiced	676,027.07
Funded	4,253,223.00	Encumbered	0.00	Received	10,677.07
Budgeted	4,253,223.00	Pre-Encumbered	0.00	Unpaid	665,350.00
		Remaining Balance	4,081,575.08		Update Total Amount

Total Amounts – includes the Rows in the totals for the rows that are selected/checked.

Overview

Search in Menu

Grants Portal Award Detail

Award Detail

Demographic

Project

Budget Status

Hello, Kenneth Schumacher

You have 0 new items in your wishlist.

Last Process Date/Time 01/11/2024 8:10:12AM

Searching Option

Business Unit EGV05

Award ID CON000000000179

Grants Demo

Search

Financial Calculating Option

Balances Both

Budget Period From

Through

Date Selection As of Date

Include FA

Activity

Recalculate

Award Title

Contact PI Schumacher,Kenneth

Department Engineering

Award Status Accepted

Award Type Grant

Purpose BARE

Burn Rate 2.00

Total Funded Amount 476,000.00

Sponsor National Cancer Institute

Ref Awd # 1 R01 CA217161-01

Federal Awd ID# 1R01CA217161-01

Grant Administrator Grant Administrator

Begin Date 04/01/2023

End Date 03/31/2025

Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

NavBar: Menu

Menu > Grants

Recently Visited

Favorites

Menu

Approvals

Grants Portal

Award Information

Personnel Information

Project Information

Security Access

Staging Data

Transaction Inquiries

Overview

Search in Menu

Grants Portal Award Detail

Award Detail

Demographic

Project

Budget Status

Hello, Kenneth Schumacher

You have 0 new items in your wishlist.

Last Process Date/Time01/11/2024 8:10:12AM

Searching & Calculation Option

Business UnitEGV05

Award IDCON000000000179

Grants Demo

Budget Period

Through

Activity

Date Selection

As of Date

Administrative

Previous Contract

Billing Term

PO:

Professional Resource

Q

<<<1-3 of 3>>>View 2

PC Business Unit	Project	Team Member	Name	Project Role	Description	% Effort
EGV05	0000000000000322	AJAMES	James.Anton	FUNC ANALYST	Functional Analyst	
EGV05	0000000000000322	KU0010	Vincent.Sonya	GRST	Graduate Students	
EGV05	0000000000000322	KU0042	Schumacher,Kenneth	PI	Principal Investigator	

Terms and Condition

Q

<<<1-1 of 1>>>View All

PC Business Unit	0000000000000322	Terms & Conditions	Description	Explanation
EGV05	0000000000000322	FLYUS	Fly American Carriers	

Attributes

Q

<<<1-1 of 1>>>View All

Attribute Value	Comments

Amendments

Q

<<<1-2 of 2>>>View All

Amendment Number	Amend Completion Date	Amendment Type	Reason	Description
0000000001	11/10/2023 3:44PM	CHG	ERR	

Overview

Search in Menu

Grants Portal Award Detail

Award Detail

Demographic

Project

Budget Status

Hello, Kenneth Schumacher

You have 0 new items in your wishlist.

Last Process Date/Time 01/11/2024 8:10:12AM

Searching & Calculation Option

Business Unit EGV05

Award ID CON000000000179

Grants Demo

Budget Period

Through

Activity

Date Selection As of Date

Detail

1-1 of 1

PC Business Unit	Project	Description	Activity	Project Type	Status	Start Date	End Date	Facilities and Admin
EGV05	000000000000322	Grants Demo	BUD	Research and Development	Open	04/01/2023	03/31/2025	Facilities and Admin

Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

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Search in Menu

Grants Portal Award Detail

Award Detail

Demographic

Project

Budget Status

Hello, Kenneth Schumacher

You have 0 new items in your wishlist.

Last Process Date/Time 01/11/2024 8:10:12AM

Searching & Calculation Option

Business Unit EGV05

Award ID CON000000000179

Grants Demo

Budget Period Through

Activity

Date Selection As of Date

Sponsor

1-4 of 4

Budget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance
EQUIP	35,000.00	0.00	0.00	0.00	35,000.00
FRINGE	80,000.00	1,440.27	0.00	0.00	78,559.73
PERSON	200,000.00	6,304.44	0.00	0.00	193,695.56
SUPL	14,000.00	0.00	0.00	0.00	14,000.00
	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining
Total Direct	329,000.00	7,744.71	0.00	0.00	321,255.29
Total FA	147,000.00	1,872.36	0.00	0.00	145,127.64
Totals	476,000.00	9,617.07	0.00	0.00	466,382.93

Cost Share

1-1 of 1

Budget Item	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining Balance
	0.00	0.00	0.00	0.00	0.00
	Budgeted	Expended	Encumbered	Pre-Encumbered	Remaining
Total Direct	0.00	0.00	0.00	0.00	0.00
Total FA	0.00	0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	0.00

Total Amount

Budgeted 476,000.00

Expended 9,617.07

Encumbered 0.00

Pre-Encumbered 0.00

Remaining Balance 466,382.93

Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

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Overview

🔍 Search in Menu

Expenditure Details Inquiry

Search Options

Business UnitEGV05

Award IDCON000000000179

PC Business Unit

Project ID

Activity ID

Budget Period

Start Date

End Date

Activity

Date SelectionAs of Date

Search

Expenditure Totals Summary

Sponsor	9,617.07	Cost Share	0.00
Third Party	0.00	Total Expended	9,617.07

Sponsor Expenditure

1-5 of 5

View 1

PC Business Unit	Project	Award ID	Activity	Budget Period	Budget Item	Accounting Date	Transaction Date	Amount	Currency	Journal ID	\$
EGV05	0000000000000322	CON000000000179	BUD	1	FACADM	05/01/2023	05/02/2023	1,152.22	USD	0000000743	
EGV05	0000000000000322	CON000000000179	BUD	1	FACADM	05/01/2023	05/02/2023	720.14	USD	0000000743	
EGV05	0000000000000322	CON000000000179	BUD	1	PERSON	12/01/2023	01/11/2024	4,000.00	USD		
EGV05	0000000000000322	CON000000000179	BUD	1	PERSON	05/01/2023	05/01/2023	2,304.44	USD	0000000743	
EGV05	0000000000000322	CON000000000179	BUD	1	FRINGE	05/01/2023	05/01/2023	1,440.27	USD	0000000743	

Cost Share Expenditure

1-1 of 1

View All

PC Business Unit	Project	Award ID	Activity	Budget Period	Budget Item	Accounting Date	Transaction Date	Amount	Currency	Supplier	PO	Voucher
								0.000				

Third Party Expenditure

Overview

←

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🔍 Search in Menu

GM Portal Personnel Cost Sum

Personnel Cost Summary

Hello, Kenneth Schumacher

You have 0 new items in your workflow.

Last Process Date/Time 08/10/2009 11:38:03AM

To change your search criteria, click Set Search Criteria.

Set Search Criteria

Refresh

Financial Calculating Option ⓘ

Balances Both

Budget Period From Through

Activity

Date Selection As of Date

Recalculate

Detail

🔍

1-6 of 6

	PC Business Unit	Project	Award ID	Empl ID	Name	Job Code	Department	Paid Amount	Committed Amount	Committed Effort	Annual Effort
☒	EGV05	PI-PRJ10	PI-PRP001	KU0010	Vincent,Sonya	KU051	Engineering	6,000.00	10,000.00	0.00	10.00
☒	EGV05	PI-PRJ10	PI-PRP001	KU0042	Schumacher,Kenneth	KU036	Engineering	14,140.00	10,000,000.00	0.00	20.00
☒	EGV05	PI-PRJ30	PI-PRP003	KU0053	Sevilla,Maria	KU036	Biology Department	5,000,000.00	20,000.00	0.00	10.00

Deselect All

Total Amount of Selected Items

Selected 6

Paid Amount 20,120,140.00

Total Cost Amount 30,570,140.00

Total Committed 10,450,000.00

Update Total Amount

Institution & Sponsor Links

Funding Allocations

Milestone Notifications

Protocols

Award Attachment

Reports

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Expertise in Oracle EPM Cloud in North America

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Overview

Search in Menu

Personnel Cost Detail

Search Options

Business UnitEGV05

Award IDPI-PRP001

PC Business Unit

Project ID

Activity ID

Budget Period

Start Date

End Date

Activity

Date SelectionAs of Date

Search

Personnel Cost Totals Summary

Sponsor Actual Costs	20,140.00	Cost Share Actual Costs	0.00	Paid Amount	20,140.00
Sponsor Committed Costs	10,010,000.00	Cost Share Committed Costs	0.00	Total Committed Costs	10,010,000.00
Total Paid Amount	10,030,140.00	Total Cost Share Costs	0.00	Total Cost Amount	10,030,140.00

Sponsor Personnel Actual Costs

Actual Costs

Chartfields

Award ID	Budget Period	Accounting Date	Transaction Date	Empl ID	Name	Job Code	Project Role	Paid Amount	Committed Amount	Currency
PI-PRP001	1	01/30/2008	01/20/2008	KU0010	Vincent, Sonya	KU051	PRJM	8,000.00	10,000.00	USD
PI-PRP001	1	01/30/2008	01/20/2008	KU0042	Schumacher, Kenneth	KU036	PI	140.00	5,000,000.00	USD
PI-PRP001	1	01/30/2008	01/20/2008	KU0042	Schumacher, Kenneth	KU036	PI	14,000.00	5,000,000.00	USD

Cost Share Personnel Actual Costs

Actual Costs

Chartfields

Award ID	Budget Period	Accounting Date	Transaction Date	Empl ID	Name	Job Code	Project Role	Paid Amount	Committed Amount	Currency
								0.000	0.000	

Configuration

• Installation Options – Grants Portal

Set up Financials/Supply Chain > Install > Installation Options > Grants Portal

Installation Options

Installation Options

Grants Portal

Transaction Source

Project

Commitment Control

Group by

Budget Group by

ACTIVITY_ID

Overlap Award Budget Period

First

Last

Reporting Tree Selection

Tree SetID

FEDRL

Reporting Tree

GM_RPT_BDGT

Tree Level

2

Reporting Analysis Group

Sponsor Expenditures

SPACT

Cost Share Expenditures

CSTSH

Sponsor Encumbrances

SPENC

Cost Share Encumbrances

CSCOM

Sponsor Pre-encumbrances

SPREQ

Cost Share Pre-encumbrances

CRQ

Third Party Expenditures

Budget and Transaction Detail

1-4 of 4

	ChartField Name	Description		
1	ACCOUNT	Account	+	-
2	DEPTID	Department	+	-
3	RESOURCE_CATEGORY	Category	+	-
4	RESOURCE_TYPE	Source Type	+	-

Configuration

- Business Unit Set Up
 - Add to Grants Portal Default

Set up Financials/Supply Chain > Business Unit Related
> Grants > Award Setup and BU Definition

Setup Grants Award BU Options

Award Setup Definition
Confidence Level Setup
Setup Level
Burn Rate Indicator Setup

Business Unit: EGV05
 Budget Item - Fringe: FRINGE
 Budget Item - FA: FACADM
 Budget Item - Rev Est:

*Project/Grant Status: In Progress
 Days To Close:
☐ Enable Multiple CFDA ☒ Allow Multiple PI's
☐ Strictly Enforce Proposal Versioning ☒ Add to Grants Portal Security
☐ Copy terms to all projects on save ☐ Sync. Modification for Period

Contract Options

 *Contract Type: GRANTS
 *Contract Legal Entity: GMSPONSOR
 *Contract Status: PENDING
 *Rate Based Product: GRANTS_REIMBURSAB
 *Fixed Amount Product: ANNUAL MAINT
 Workbench Template ID: GRANTS

Project Options

 PC Business Unit: EGV05
 *Integration Template: EGV05

General Ledger Options

 GL Business Unit: EGV05
 Currency: USD
 *Ledger Group: EG_UNIV
 Ledger: EG_UNIV_BD

Billing Options

 *Billing Business Unit: EGV05
 *Bill Type Identifier: GM
 Minimum Bill Amount: 100.00

Protocol Options

 Continuing Review Interval - Animal: 12 Months
 Continuing Review Interval - Human: 12 Months

Enable Proposal Approval Workflow

☒ Traditional Workflow ☐ Approval Workflow Engine
 Trigger Status:
 Approval Status:

Commitment Control Update Options

 Days to Add to Project End Date: 90
☒ Allow User Override

Rows to Update

☐ Current Effective Dated Row
☒ Current & Future Dated Rows
☐ All Rows

* Required Fields

Configuration

- Burn Rate Indicator Set Up for spending

Set up Financials/Supply Chain > Business Unit Related > Grants > Award Setup and BU Definition, Burn Rate Indicator Setup

Setup Grants Award BU Options

[< Confidence Level Setup](#)
[Setup Level](#)
[Burn Rate Indicator Setup](#)

Business Unit EGV05

Slow Burn Rate: Potential for Under Spending

Percentage From -999.00
Percentage To -100.00

Normal Burn Rate: Average Rate of Spending

Percent From -99.00
Percent To -75.00

Accelerated Burn Rate: Potential for Over Spending

Percent From -74.00
Percent To 999.00

Save
Return to Search
Notify

[Award Setup Definition](#) | [Confidence Level Setup](#) | [Setup Level](#) | [Burn Rate Indicator Setup](#)

Configuration

- Grants Portal Security

If a role is granted Read/Write Access on this page, then an employee who has that role can add additional employees on any security assignment page.

← | ⌚ | ❤️

Q Search in Menu

Setup Grants Portal Security

Grants Portal Security

Access Rights

SetID SHARE

Detail

⌕

1-7 of 7

	Project Role	Description	Award Level	Project Level	Access Code		
1	ADM	Administrator	☒	☐	Read Only Acces	+	-
2	CADM	Contract Administrator	☒	☐	Read/Write Acce	+	-
3	CPI	Co-PI	☒	☒	Read/Write Acce	+	-

Save

Return to Search

Notify

Add

Update/Display

Set up Financials/Supply Chain > Security > Grants Portal Security

Security Options

- **2 Layers of Security**

- Award Roles

- PI (Project Team = PI)
 - Grant Administrator (GM_AWARD.GM_ADMIN_CNTCT)
 - Automatically granted access when select “Add to Grants Portal Security” on generate award

- Assigning by:

- Global
 - PI/Project Manger
 - Division
 - Award
 - Project
 - Employee

Security Options

Grants Portal Security

Global Security Access

Employees Granted Global Portal Page Access [?](#) Personalize | Find | View All | Portal Page Access 1 of 1 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐	31	03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	+

Grants Portal Security

PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria [?](#)

Assigned By Employee ID

Employees Granted Portal Page Access [?](#) Personalize | Find | View All | Portal Page Access 1-2 of 2 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐	31	03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	+
KU0068	Kessler,Marc	☒	☒	☐	31	03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	+

Grants Portal Security

Division Access

The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.

Search Criteria [?](#)

Employee ID

Granted Access to Divisions [?](#) Personalize | Find | View All | Portal Page Access 1 of 1 Last

Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐	31	03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+

PI/Project Manager Division Award Project Employee

Grants Portal Security

Award Access

Search Criteria [?](#)

Business Unit

Employees Granted Award Portal Page Access [?](#) Personalize | Find | View All | Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐	31	03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security

Project Access

Search Criteria [?](#)

PC Business Unit ☐ Include Team Member?

Research of structure of prote

Employees Granted Project Portal Page Access [?](#) Personalize | Find | View All | Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0050	Hill,Nicola	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0055	Owyang,Nety	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+

Security Options

Global Security Access

If you select the Security Administrator check box, the employee can assign distributed security access to other users to view portal pages.

Grants Portal Security

Global Security Access

Employees Granted Global Portal Page Access ?									
Personalize Find View All [Grid Icon] [Calendar Icon]									
Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐	[Calendar Icon]	03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	[+]

Grants Portal Security

PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria ?

Assigned By Employee ID KU0036

Pritchard,Martin

Search

Employees Granted Portal Page Access ?

Personalize | Find | View All |  

Portal Page Access 1-2 of 2 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐		03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	
KU0068	Kessler,Marc	☒	☒	☐		03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	

Grants Portal Security

Division Access

The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.

Search Criteria ?

Employee ID 0000000008

Watts,Priscila

Search

Granted Access to Divisions ?

Personalize | Find | View All | [Grid Icon] | [Calendar Icon]

Portal Page Access 1 of 1 [Previous] [Next] Last

Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐		03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+

PI/Project Manager

Division

Award

Project

Employee

Grants Portal Security

Award Access

Search Criteria ?

Business Unit EGV05

Award ID PI-PRP001

The effects of insulin on laboratory rats

Search

Employees Granted Award Portal Page Access ?

Personalize | Find | View All | [Grid Icon] | [Calendar Icon]

Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒	03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐	03/30/2017 9:29:57.000000AM	03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security

Project Access

Search Criteria

PC Business UnitEGV05

ProjectPI-PRJ61

Include Team Member?

Search

Research of structure of prote

Employees Granted Project Portal Page Access

Personalize | Find | View All |

Portal Page Access 1-4 of 4

Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID
☐	KU0010	Vincent,Sonya	☒	☒		03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1
☐	KU0042	Schumacher,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1
☐	KU0050	Hill,Nicola	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1
☐	KU0055	Owyang,Nety	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1

Security Options

PI/Project Manager Access

Employees who are entered in the grid are granted access to the same awards and projects that the employee entered in the Assigned By Employee ID field has access to and at the same level. However, you can deselect the Award Page and Project Page check boxes to remove access to the awards and projects.

Grants Portal Security

Global Security Access

Employees Granted Global Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐	31	03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	+

Grants Portal Security

PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID field has access to.

Search Criteria ?

Assigned By Employee ID KU0036 Pritchard,Martin

Search

Employees Granted Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-2 of 2 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐	31	03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	+
KU0068	Kessler,Marc	☒	☒	☐	31	03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	+

Grants Portal Security

Division Access

The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.

Search Criteria ?

Employee ID 0000000008 Watts,Priscila

Search

Granted Access to Divisions ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐	31	03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+

PI/Project Manager Division Award Project Employee

Grants Portal Security

Award Access

Search Criteria ?

Business Unit EGV05 Award ID PI-PRP001 The effects of insulin on laboratory rats

Search

Employees Granted Award Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐	31	03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security

Project Access

Search Criteria ?

PC Business Unit EGV05 Project PI-PRJ61 Include Team Member?

Search

Research of structure of prote

Employees Granted Project Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0050	Hill,Nicola	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0055	Owyang,Nety	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+

Security Options

PI/Project Manager Access

Select a division to provide all employees in that division access to the same awards and projects that the PI or PM has access to. This field is equal to the Subdivision field on the Project Department page

Grants Portal Security

Global Security Access

Employees Granted Global Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐	31	03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	+

Grants Portal Security

PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria ?

Assigned By Employee ID KU0036 Pritchard,Martin

Search

Employees Granted Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-2 of 2 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐	31	03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	+
KU0068	Kessler,Marc	☒	☒	☐	31	03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	+

Grants Portal Security

Division Access

The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.

Search Criteria ?

Employee ID 0000000008 Watts,Priscila

Search

Granted Access to Divisions ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐	31	03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+

PI/Project Manager Division Award Project Employee

Grants Portal Security

Award Access

Search Criteria ?

Business Unit EGV05 Award ID PI-PRP001 The effects of insulin on laboratory rats

Search

Employees Granted Award Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	*Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐	31	03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security

Project Access

Search Criteria ?

PC Business Unit EGV05 Project PI-PRJ61 Include Team Member? Research of structure of prote

Search

Employees Granted Project Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0010	Vincent,Sonya	☒	☒	31	03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0050	Hill,Nicola	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0055	Owyang,Nety	☒	☒	31	08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+

Security Options

Award Access

Use this page to grant access to employees by business unit and award ID.

Select to indicate that the employee can view personnel information on the Personnel Summary and the Personnel Cost Details pages for the project

Grants Portal Security

Global Security Access

Employees Granted Global Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐		03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	+

Grants Portal Security

PI/Project Manager Access

The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.

Search Criteria ?

Assigned By Employee ID KU0036 Pritchard,Martin

Search

Employees Granted Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-2 of 2 Last

Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐		03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	+
KU0068	Kessler,Marc	☒	☒	☐		03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	+

Grants Portal Security

Division Access

The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.

Search Criteria ?

Employee ID 0000000008 Watts,Priscila

Search

Granted Access to Divisions ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1 of 1 Last

Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐		03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+

PI/Project Manager Division Award Project Employee

Grants Portal Security

Award Access

Search Criteria ?

Business Unit EGV05 Award ID PI-PRP001 The effects of insulin on laboratory rats

Search

Employees Granted Award Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	*Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒		03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐		03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security

Project Access

Search Criteria ?

PC Business Unit EGV05 Project PI-PRJ61 Include Team Member?

Search

Research of structure of prote

Employees Granted Project Portal Page Access ? Personalize | Find | View All | [Grid Icon] | [Calendar Icon] Portal Page Access 1-4 of 4 Last

Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0010	Vincent,Sonya	☒	☒		03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0050	Hill,Nicola	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0055	Owyang,Nety	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+

Security Options

Project Access

Use this page to grant access to employees by business unit and project ID.

Grants Portal Security									
Global Security Access									
Employees Granted Global Portal Page Access ? Personalize Find View All [Grid Icon] [Calendar Icon] Portal Page Access 1 of 1 Last									
Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0010	Vincent,Sonya	☒	☒	☐		03/30/2017 9:34:22.000000AM	03/30/2017 9:34:22AM	VP1	+

Grants Portal Security									
PI/Project Manager Access									
The employees entered in the grid will be given access to all awards and projects that the PI/Project Manager entered in the Assigned By Employee ID has access to.									
Search Criteria ?									
Assigned By Employee ID KU0036 Pritchard,Martin									
Search									
Employees Granted Portal Page Access ? Personalize Find View All [Grid Icon] [Calendar Icon] Portal Page Access 1-2 of 2 Last									
Empl ID	Name	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
KU0036	Pritchard,Martin	☒	☒	☐		03/30/17 9:51:37.000000AM	03/30/17 9:52:13AM	VP1	+
KU0068	Kessler,Marc	☒	☒	☐		03/30/17 9:51:41.000000AM	03/30/17 9:52:13AM	VP1	+

Grants Portal Security									
Division Access									
The PI/Project Manager entered in the Search Criteria will be given access to all projects in the division(s) listed in the grid.									
Search Criteria ?									
Employee ID 0000000008 Watts,Priscila									
Search									
Granted Access to Divisions ? Personalize Find View All [Grid Icon] [Calendar Icon] Portal Page Access 1 of 1 Last									
Division	Description	Award Page	Project Page	Security Administrator	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
10000	Human Resources	☒	☒	☐		03/30/17 9:42:39.000000AM	03/30/17 9:44:11AM	VP1	+
PI/Project Manager Division Award Project Employee									

Grants Portal Security									
Award Access									
Search Criteria ?									
Business Unit EGV05 Award ID PI-PRP001 The effects of insulin on laboratory rats									
Search									
Employees Granted Award Portal Page Access ? Personalize Find View All [Grid Icon] [Calendar Icon] Portal Page Access 1-4 of 4 Last									
Select	Empl ID	Name	Award Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0004	Grafton,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0010	Vincent,Sonya	☒	☒		03/30/2017 9:34:22.254000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0120	Sims,Martin	☒	☐		03/30/2017 9:29:57.000000AM	03/30/2017 9:31:32AM	VP1	+

Grants Portal Security									
Project Access									
Search Criteria ?									
PC Business Unit EGV05 Project PI-PRJ61 Include Team Member? Research of structure of prote									
Search									
Employees Granted Project Portal Page Access ? Personalize Find View All [Grid Icon] [Calendar Icon] Portal Page Access 1-4 of 4 Last									
Select	Empl ID	Name	Project Page	Personnel Page	End Date	DateTime of Query Creation	Last Update Date/Time	Last Update User ID	
☐	KU0010	Vincent,Sonya	☒	☒		03/30/2017 9:34:22.267000AM	03/30/2017 9:34:22AM	VP1	+
☐	KU0042	Schumacher,Kenneth	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0050	Hill,Nicola	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+
☐	KU0055	Owyang,Nety	☒	☒		08/18/2009 12:00:00.000000AM	08/18/2009 12:00:00AM	VP1	+

Batch Processing

← | ⌚ | ❤️ Search in Menu

GM Portal Security Process

Run Control ID: GM_PORTAL_SEC Report Manager Process Monitor Run

Option

Process Option: Business Unit

Values
*Business Unit: EGV05

☐ Load blue bird awards + -

Save Return to Search Notify Add Update/Display

Updates portal security tables when security changes are made after the Generate Award process has run.

Examples:

- A project is added for an existing contract.
- A project is deleted for an existing contract.
- The Add to Grants Portal Security? check box was not selected, but should have been selected, during the Generate Award process.

Batch Processing

Award and Project Data

←

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❤️

🔍 Search in Menu

Portal Stage Award & Proj Data

Run Control ID

GM_PORTAL_STAG

Report Manager

Process Monitor

Run

Staging Data

☐ Include Closed Awards within

Days

☐ Include Closed Projects within

Days

Award

🔍

|

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1 of 1

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View All

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View All

PC Business Unit

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Save

Return to Search

Notify

Add

Update/Display

Include Closed Award within Days:

Select to indicate that you want to include closed awards that fall within the last x number of days, which is indicated in the Days field. All projects associated with the award are processed.

Include Closed Projects within Days:

Select to indicate that you want to include closed projects that fall within the last x number of days, which is indicated in the Days field.

Batch Processing

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🔍 Search in Menu

Portal Stage Labor Cost Data

Run Control ID

GM_PORTAL_STAG

Report Manager

Process Monitor

Run

Staging Effort Information

File Name

Save

Notify

Add

Update/Display

SMU Grants Overview

- **Conversion**

- Converted Grants and Customer data from MS Access DBs and spreadsheets
- Used a RPA tool to replicate hitting the "Generate Award" button after all proposals were imported
- Imported all budget info from GL budget ledger and posted to KK
- Pulled historical transactions, budget checked, imported to project resource and reconciled all ledgers, KK, GL
- Implemented in phases: Phase 1 – Grants module, Phase 2 – Billing and AR, Phase 3 – turn on Project Costing and KK

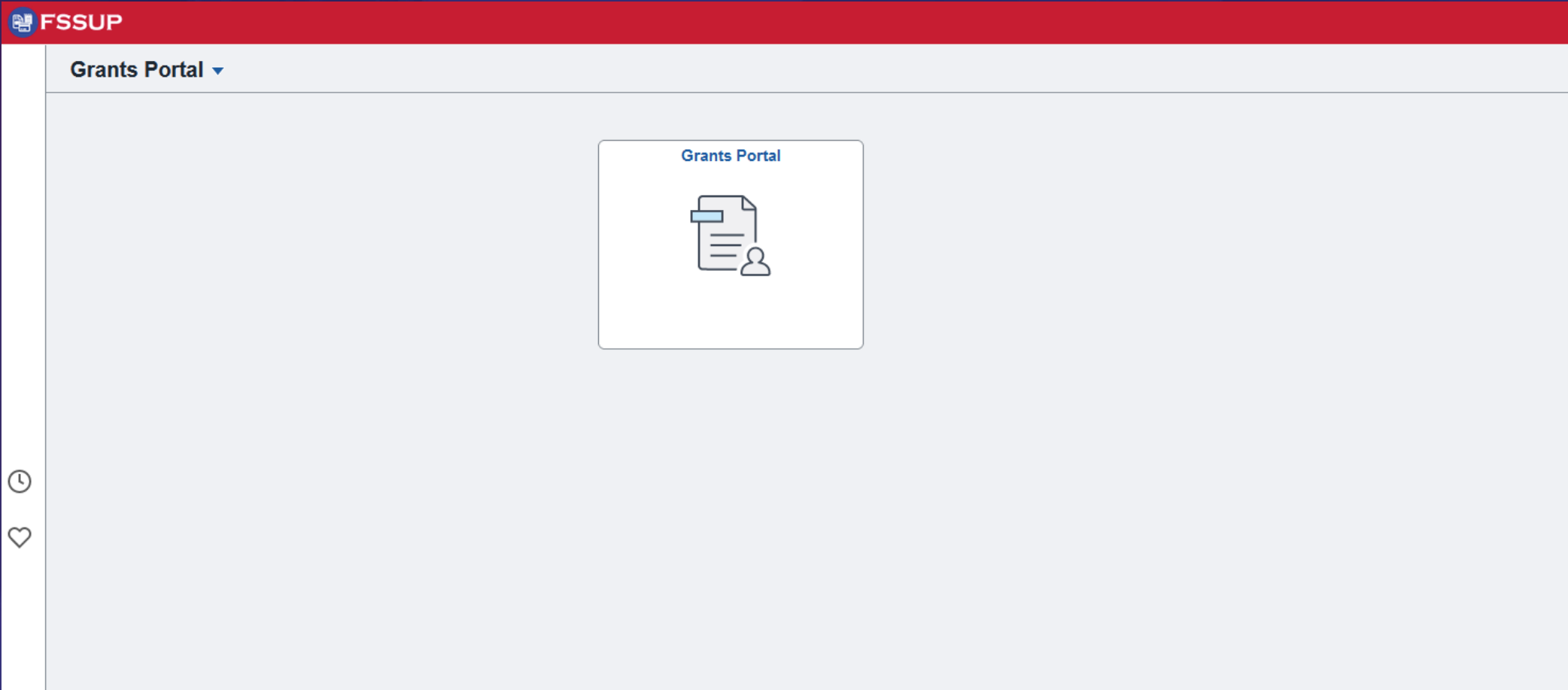
SMU Grants Overview

- Custom Payroll to Project Costing Interface (delivered Load Interface)
- Next steps: Effort Certification, Load Salary Encumbrances to Portal
- Pre-Award

SMU Portal Overview

- Created PI Homepage
- Security – Configured at 4 different levels
 - PI
 - Department Chairs
 - School
 - Administrators (Grants and Contract Accounting)
- Configuration – Data is staged from proj_resource to give transaction level detail to the PIs

SMU Portal Overview



SMU Portal Overview

Grants Portal

GM Portal Project Summary Info

GM Portal Project Detail Info

SMU Grants Portal

Project Summary

Hello, Allison Deiana

Last Process Date/Time

To change your search criteria, click Set Search Criteria.

Set Search Criteria

Refresh

Financial Calculating Option

Balances Both

Include FA

Budget Period From

Through

Account

Date Selection As of Date

Recalculate

Average Spend Rate

Potential Under Spending

Average Rate Spending

Potential Over Spending

Detail

Personalize Find

Summary 1 of 1 Last

Demographics Financial

	PC Bus Unit	Project	Project Title	Award ID	Award Title	Start Date	End Date	Sponsor	Contact PI	Department	Grant Administrator
☒		Project	Project Title	Contract	Award Title			Sponsor			

Deselect All

Total Amount of Selected Items

Selected	0	Funded	0.00	Budgeted	0.00
		Expended	0.00	Encumbered	0.00
		Pre-Encumbered	0.00	Remaining Balance	0.00

Update Total Amount

Tips and Lessons Learned

- Staging Portal Data – Needed to pull the transactions from proj_resource or project costing, in order for PIs to view the details of the transactions.
 - Lessons learned – Took longer to pull pre go live GL data and convert that into the proj_resource table as estimated.
- Security – needed to troubleshoot issues with security for awards/projects that were converted. Security at the department/division level for those projects did not work as expected.

Tips and Lessons Learned

- Staging Portal Data – Found Oracle bug - if some grants have prior budget periods with no budget, then the process creates a blank budget row. We ran a SQL update process each time to eliminate the blank row
- Encumbrances (conversion) - Because we went live with KK, some POs and Reqs were approved with no budget checking, this caused some errors, plus we needed to clean up the portal encumbrance and pre-encumbrance buckets for some grants.

Tips and Lessons Learned

- Ability to use portal security tables for other Reporting/Query Security
- Add CONTRACT_DT to Bill By Identifier
- Budget Items values must equal the Tree Values exactly

Tips and Lessons Learned

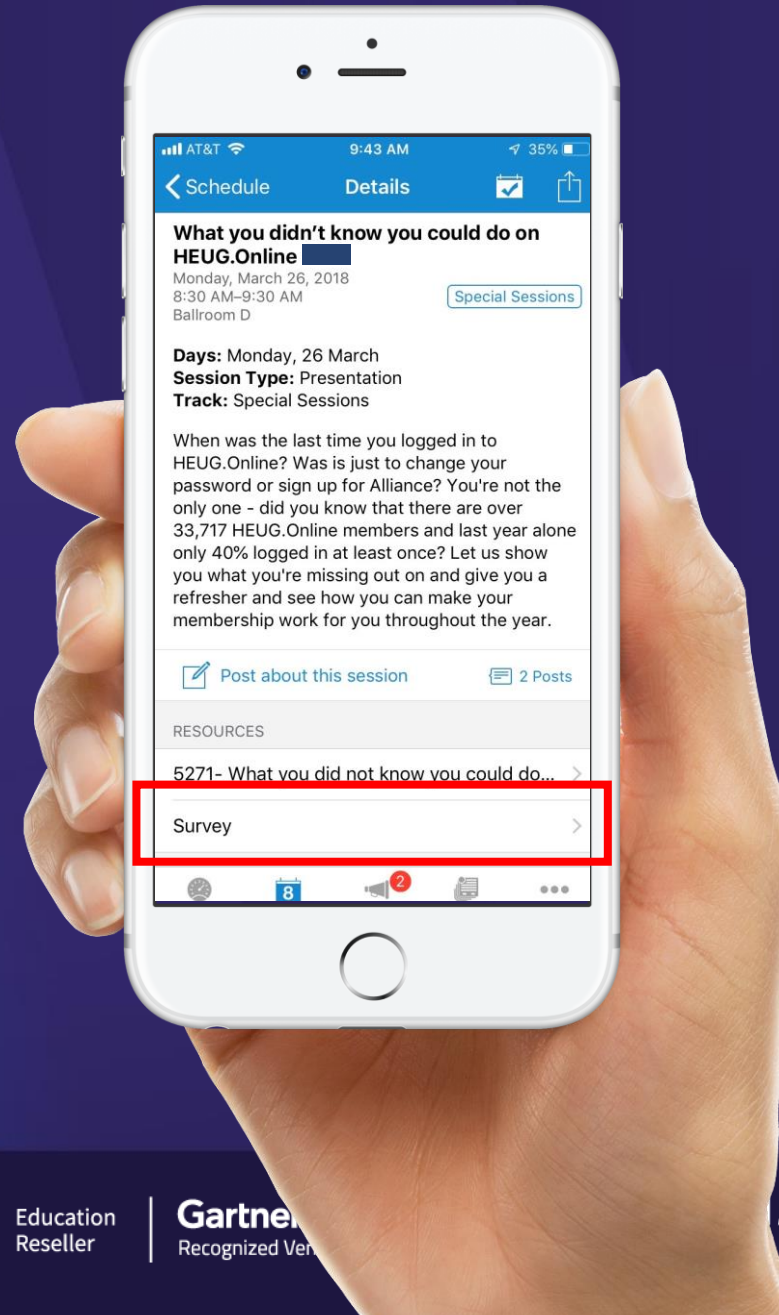
- As Delivered, the Tree Look up uses **GM_PT_TREE_VW** which restricts the trees to Tree Structure **ACCOUNT**.

Row	Record	Field Name	Field Nbr	Def. Recnm	Def. Fldnm	Curr Cntl	Edit Table	Use/Edit	Use/Edit 2	Sub Record	SubRec Ver	Set Cntrl	Control	Label ID	Last Upd DtTm	Last Upd User	Time Zone Use	TZ Fld name	Rel TmDt Fld Nm	Curr Control
1	INSTALLATION_GM	ACCOUNT	6				GM_PT_ACCT_VW	8404992	0	N	0		99		04/07/2008 3:53:03PM	PPLSOFT	0			0
2	INSTALLATION_GM	BUDGET_GROUP_BY	18				%EDITTABLE	8404992	0	N	0		99		01/20/2009 3:16:43PM	PPLSOFT	0			0
3	INSTALLATION_GM	BUD_OVERLAP_SW	7		F			8389120	0	N	0		99		04/23/2012 9:45:31AM	PPLSOFT	0			0
4	INSTALLATION_GM	COST_SHARE_EXPD	12		CSTSH		PROJ_AN_GRP_TBL	8404992	0	N	0	ANALYSIS_SETID	99		12/30/2008 10:19:17AM	PPLSOFT	0			0
5	INSTALLATION_GM	COST_SHARE_PREENCB	16		CRQ		PROJ_AN_GRP_TBL	8404992	0	N	0	ANALYSIS_SETID	99		12/30/2008 10:19:17AM	PPLSOFT	0			0
6	INSTALLATION_GM	PC_OR_KK_FLG	19		P			8389120	0	N	0		99		11/06/2008 5:08:16PM	PPLSOFT	0			0
7	INSTALLATION_GM	SPONSOR_EXPD	11		SPACT		PROJ_AN_GRP_TBL	8404992	0	N	0	ANALYSIS_SETID	99		12/30/2008 10:19:17AM	PPLSOFT	0			0
8	INSTALLATION_GM	THIRDPARTY_EXPD	17				PROJ_AN_GRP_TBL	8404992	0	N	0	ANALYSIS_SETID	99		06/01/2008 10:10:50PM	PPLSOFT	0			0
9	INSTALLATION_GM	TREE_LEVEL_NUM	10				GM_PT_TREEVL_V	8404992	0	N	0		99		12/05/2011 10:05:08AM	PPLSOFT	0			0
10	INSTALLATION_GM	TREE_NAME	9				GM_PT_TREE_VW	8404992	0	N	0	TREE_SETID	99		06/02/2008 12:01:47AM	PPLSOFT	0			0

Row	SQL Object ID	SQL Object type	Market	DB Type	Eff Date	SeqNum	SQL Stmt Text
1	GM_PT_TREE_VW	2	GBL		01/01/1900	0	SELECT DISTINCT A.SETID, A.TREE_NAME, A.DESCR FROM PSTREEDEFN A WHERE A.TREE_STRICT_ID = 'ACCOUNT' AND A.EFFDT = (SELECT MAX(A1.EFFDT) FROM PSTREEDEFN A1 WHERE A1.SETID = A.SETID AND A1.TREE_NAME = A.TREE_NAME AND A1.SETCNTRLVALUE = A.SETCNTRLVALUE AND A1.EFFDT <= %CurrentDateIn AND A1.EFF_STATUS = 'A')

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1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the “Resources” button and “Survey”
You will be required to login once with your Eventsential username and password.



Questions?

THANK YOU!

This presentation and all Alliance 2024 presentations will be available for download from the conference site at:
www.alliance-conference.com



SpearMC Sessions at Alliance

Date	Time	Session Title	Presenters	Session #
3-Mar	12:00 - 3:00 PM	Extending and Customizing PeopleSoft Activity Guides using AG Composer Framework	Logesh Balasubramaniam – SpearMC	10637
3-Mar	4:30 - 7:30 PM	Welcome Reception: Sponsored by SpearMC		Conference
4-Mar	10:00 - 11:00 AM	Business Process Weaver – Automation please!	Yuliya Ivanova – Kaiser Jessica Mann – SpearMC	10666
4-Mar	2:00 PM - 3:00 PM	Supplier Enablement at the J Paul Getty Institute	Zach Scholnick – The J. Paul Getty Trust Randall Johnson – SpearMC	10714
4-Mar	3:00 – 3:30 PM	Stop and Share: Grants Dashboards and Forecasting	Jessica Mann – SpearMC	11114
5-Mar	10:00 – 11:00 AM	How UMASS Utilized Kibana to Monitor Student Billing Process	Susan McHugh – University of Massachusetts Randall Johnson – SpearMC	11037
5-Mar	2:00 - 3:00 PM	State of North Dakota Implementation of Oracle Guided Learning (OGL) in PeopleSoft	Lisa Berg – State of North Dakota Cameron McClurg – SpearMC	10650
5-Mar	3:30 - 4:30 PM	Slate CRM Integrations transform UMass System, Implementation & Renewal	Tom Paret – University of Massachusetts Dan Moran – SpearMC	10697
5-Mar	3:30 - 4:30 PM	PeopleSoft Grants Portal - Overview and Tips on Rolling Out the Grants Portal	Ron Lujan – Southern Methodist University Jessica Mann – SpearMC	10737
6-Mar	11:30 - 12:30 PM	User Panel: Oracle Guided Learning in PeopleSoft	Ben Amster – City of Seattle Lisa Berg – State of North Dakota Cameron McClurg – SpearMC	10720

2024 Training Calendar

Upcoming Class Schedule

Date	Courses
March 12	PeopleSoft 9.2 Query Basic & Intermediate for HCM
March 13	PeopleSoft 9.2 Query Advanced for HCM
March 26	PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions
March 27	PeopleSoft 9.2 Query Advanced for Campus Solutions
April 9	PeopleSoft 9.2 HCM Bootcamp – Core HR
April 10	PeopleSoft 9.2 HCM Bootcamp – NA Payroll
April 11	PeopleSoft 9.2 HCM Bootcamp – Benefits
April 9 – 11	PeopleSoft 9.2 HCM Bootcamp – Core HR / NA Payroll / Benefits (All 3-Days)
May 7	PeopleTools 8.59 – 8.60 Open Search Dashboards (formerly Kibana)
June 11	Automated Testing with PeopleSoft Test Framework

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