

SESSION #11114

Stop and Share: Grants Dashboards and Forecasting

Agenda

- Introductions
- Grants Dashboard Demo
- What's Coming & How you can get involved
- Grants Forecasting Tools Discussion

Meet the Team



Jessica Mann

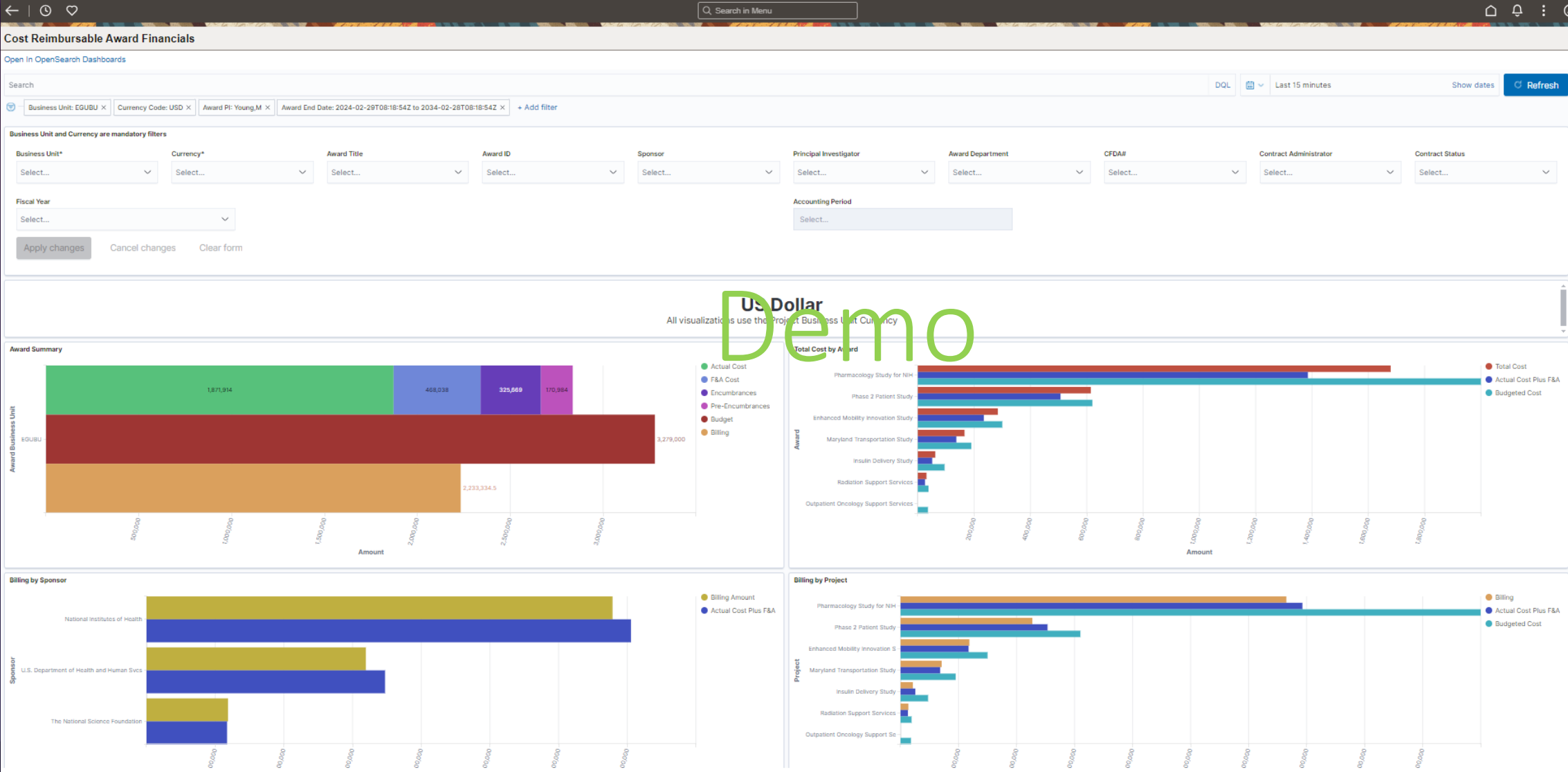
SpearMC
Managing Director,
jessica.mann@spearmc.com

Session Overview

Come see a demo of the new PeopleSoft Cost Reimbursable Award Insights dashboard for Grants as well as discuss what you'd like to see for other Grants dashboard visualizations. We'll also talk about grants forecasting needs and tools.

Cost Reimbursable Awards Dashboard Demo

Cost Reimbursable Awards



Grants Webinar

PEOPLESOFT MANAGED SERVICES
PEOPLESOFT EXPERTISE
PEOPLESOFT TRAINING
ORACLE TECHNOLOGIES

Manage the Full Spectrum of Research Administration Responsibilities

PeopleSoft Grants Management enables your sponsored research team to complete a wide range of grant-related duties, including generating proposals, transitioning proposals into awards, tracking awards, facilities and administration processing, generating bills and financial reporting. PeopleSoft Grants will increase operational efficiencies, complies with regulatory requirements and ensures fiscal accountability to compete for grant awards.

Roadmap for Contracts, Grants and Project Costing

Contracts & Grants

*Manage
Proposal
Submission
Status &
Generate
Awards*

*Award Portal
Insights
Dashboard*

*Contract and
Award Update
Wizard*

Project Costing

Budget Copy

*Year & Period
Updates to Match
GL* 💡

*Exclude
Transactions from
Project Costing* 💡

*Exclude
Transactions from
PC Pricing* 💡

*Partial Wildcards
in Rate Set* 💡

Customer Ideas



Migrating Business Processes to Activity Guides



Good Candidates are:

- Common or repetitive tasks
- Bulk updates

Benefits

- Efficiency gains
- Intuitive to users
- Reduced training for new employees

Projects Update Wizard

Image 42

Projects Update Wizard

1 Select Update Type 2 Enter New Values 3 Select Projects & Activities 4 Review and Submit

Restart Save For Later Next >

*Update Type

*Update Description

- Activity User Fields
- End Date
- Project Location
- Project Manager
- Project Team
- Project Template Status
- Project User Fields
- Status
- Type

Extending to Grants Fields

- PI, Co-PI, Post Award Admin
- Award Status
- Institution and ALN
- Terms & Conditions
- End Date

Extending to Contracts Fields

- Contract Administrator
- Billing Specialist
- Bill and Revenue Plan Status
- Plan Hold Status
- End Date

PeopleSoft Customer Focus Groups

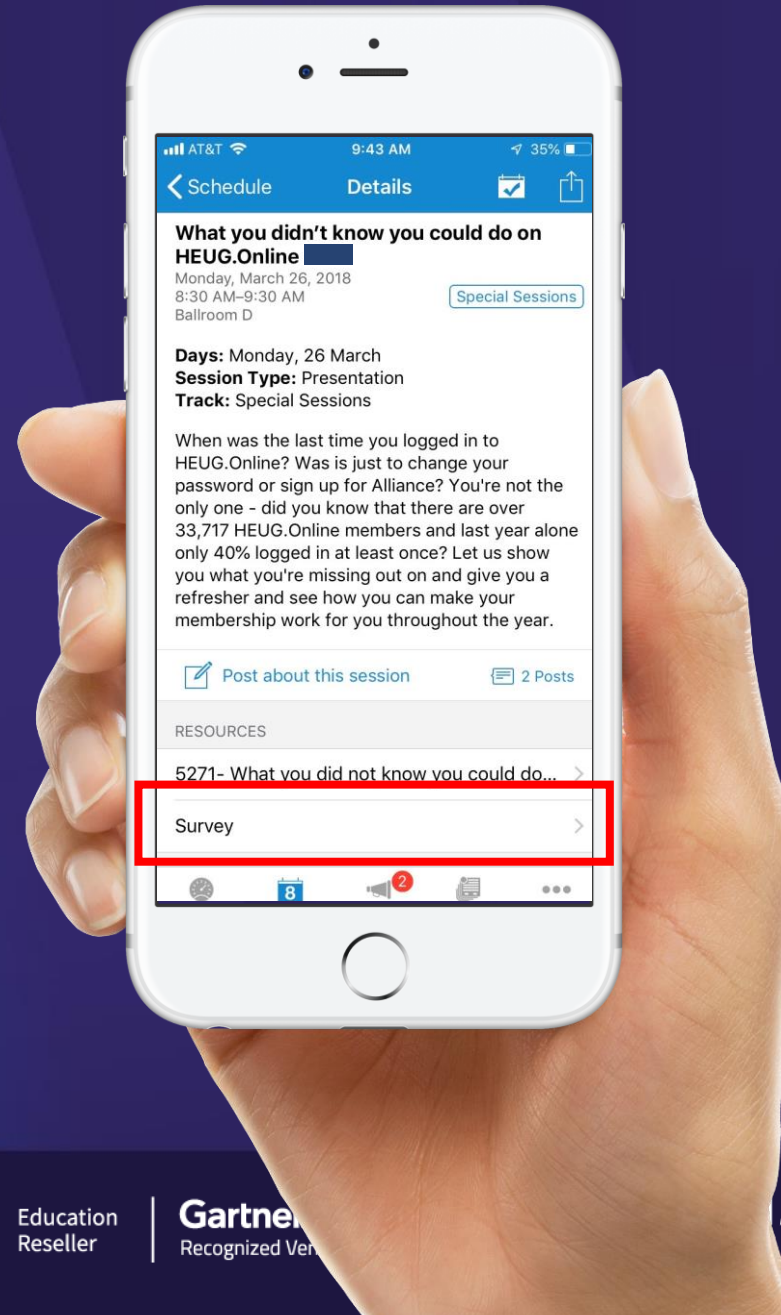
- THE WAY to have input on features
- Open to all customers with signed confidentiality agreement
- On average, meet for 2- 3 times per feature
- Current meetings
 - Award Portal Insights Dashboard
 - Contract & Award Bulk Updates
 - Project Asset Capitalization
 - Page and Field Configurator Change Tracking Notifications
- Contact joe.willever@oracle.com



Grants Forecasting Tools Discussion

Session Surveys

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

Visit our [website](#) for more information