

SESSION #5057

Deep Dive into New Grants Functionality – PUM 42-51

Meet the Team



Jessica Mann

Managing Director, Oracle PeopleSoft Grants Management
SpearMC Consulting

jessica.mann@spearmc.com

- 25 Years – PeopleSoft Consulting Experience
- 22 Years – Specialty in PeopleSoft Grants Management

- Grants
- Project Costing
- Contracts
- Billing
- Accounts Receivable
- Commitment Control

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



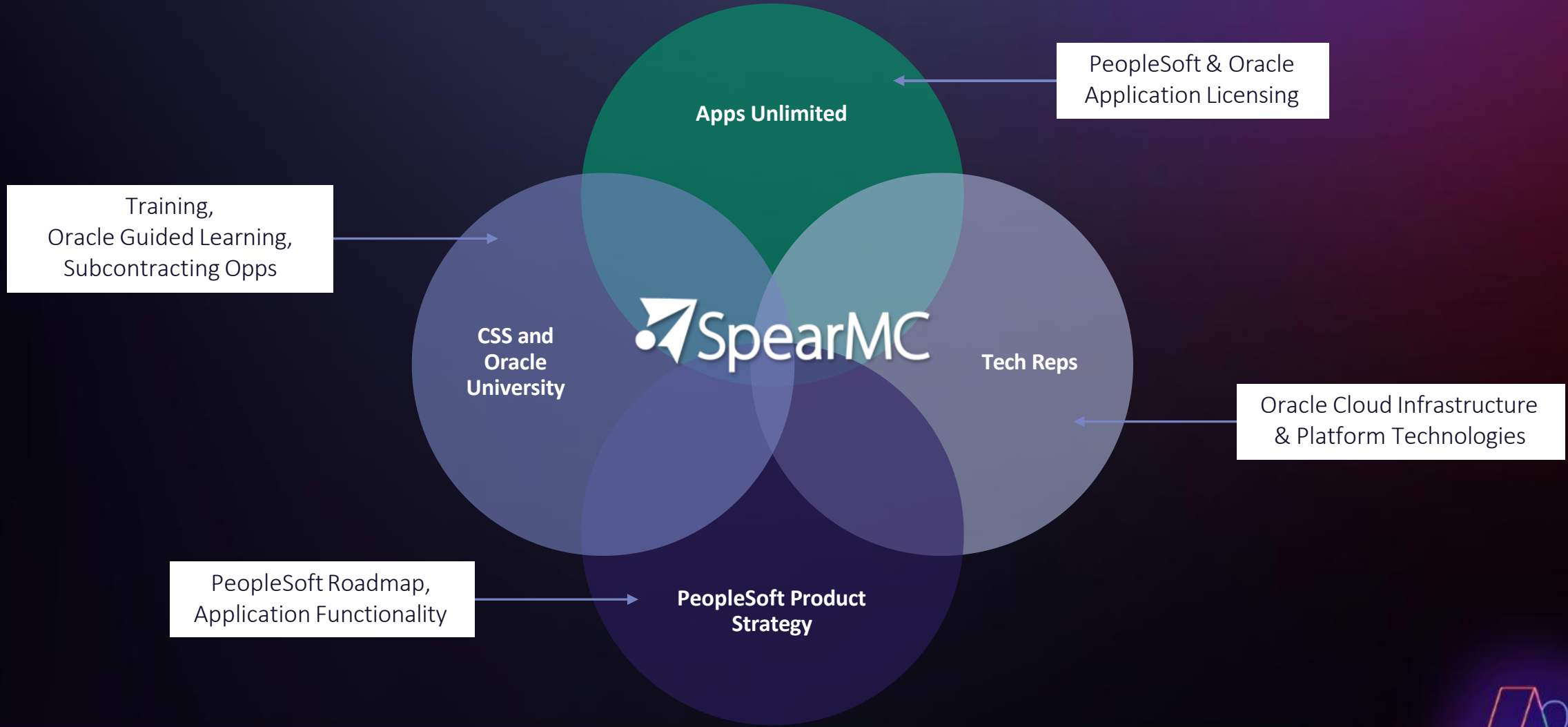
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



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

SpearMC Strategy: Positioning with Oracle



Products and Services

HEALTHCARE | HIGHER ED | FINANCIAL SERVICES | PUBLIC SECTOR



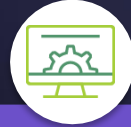
Managed Services

PeopleSoft
Administration

PeopleSoft
Functional Support

PeopleSoft Infrastructure

PeopleSoft Development



PeopleSoft Expertise

Financials and
Supply Chain

Human Capital
Management

Campus Solutions

Enterprise Performance
Management



PeopleSoft Training

All-Access Learning Pass

Live Private Training

Oracle Guided Learning

Public Training Classes



PeopleSoft Products

Segregation of Duties

Grants Labor
Cost Distribution

OGI Starter Kit

PTF Testing Grounds



Oracle Cloud

PeopleSoft to
Cloud Migration

Oracle Fusion
Cloud Training

Oracle Cloud Infrastructure

Cloud Learning
Subscriptions

ORACLE CONTRACT VEHICLES

Oracle Public Sector Addendum | Texas DIR | University of Texas System | E&I for Higher Education | CSU / Univ of CA / CCC | State of New York

PeopleSoft Training Opportunities

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

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

- **PeopleTools:** System Administration, Fluid Development, Security, PeopleCode
- **Bootcamps:** FSCM, HCM, PeopleTools
- **Reporting:** Query, PTF, BI Publisher, PeopleSoft Insights
- **FSCM:** Fluid Approvals & Delegations, Expenses, Procurement & Supplier Contract Management
- **HCM:** Core HR, Payroll, Benefits
- **Campus Solutions:** Advisement, Admissions, Registration, 3C's

PeopleSoft All-Access Learning Pass



[Visit our website](#) or scan the QR code for a full listing of available public courses and free webinars

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
- Click [here](#) to determine membership



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Session Overview

- Come to this session to see the latest and greatest enhancements made to PeopleSoft Grants Management, delivered through PUM 42–51. We will also take a look at what is on the roadmap for future enhancements. If you manage grants, you won't want to miss this session!

Agenda

- Introductions
- What's New – GM, PC, CA, BI, AR, KK
- What's Coming
- Ideas Lab

Poll #1

Poll #1

- Are you live on PeopleSoft Grants today? (Multiple Choice)
 1. Yes, using PS Grants in production.
 2. No, not live yet but we do have the licenses for PS Grants.
 3. No, not live yet and have not licensed yet.

Poll #2

Poll #2

- What type of features are you most interested in seeing enhancements for PeopleSoft Grants? (Open Ended/Short Answer)

Forecasting

**Grantor/Subaward
Management**

Insights/Dashboards

Effort Reporting

More Fluid pages

WorkCenters

**Additional Award/Project Set Up
Mass Updates**

**Business
Process
Weaver**

**Award
Milestones**

What's New



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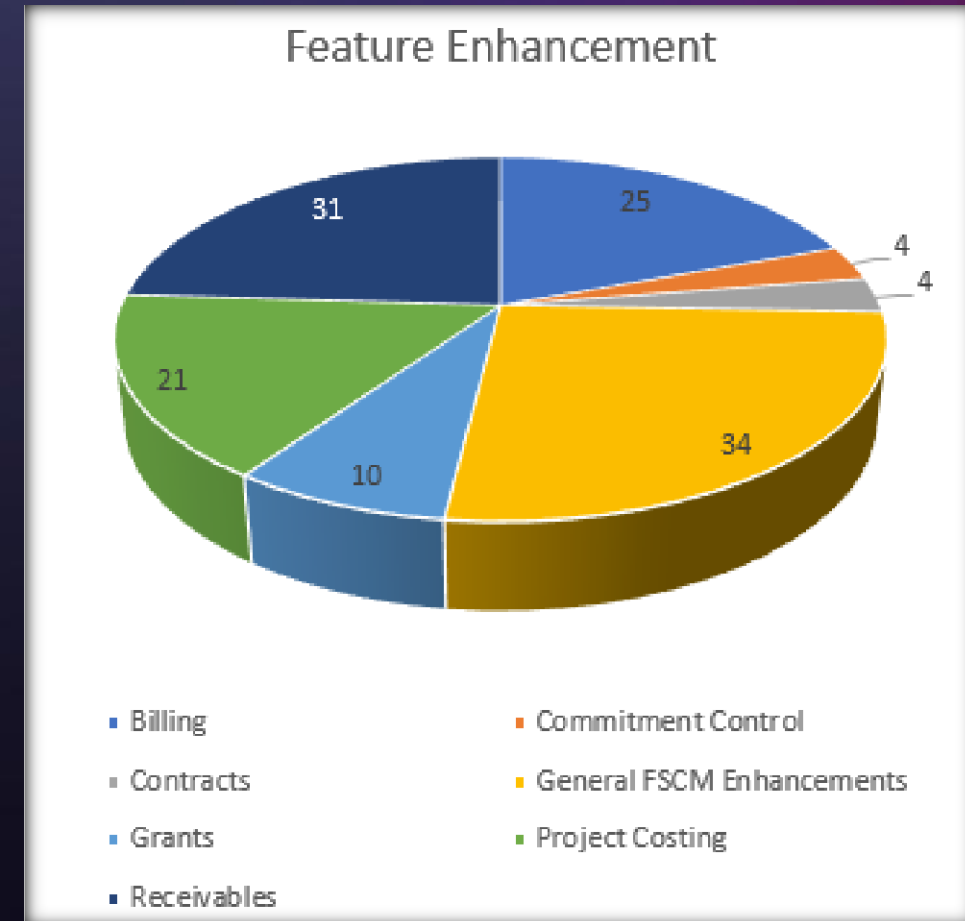
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What's New (42-52)

Module	# of Feature Updates
Billing	25
Commitment Control	4
Contracts	4
General FSCM Enhancements	34
Grants	10
Project Costing	21
Receivables	31



Grants



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Assistance Listing Number - ALN

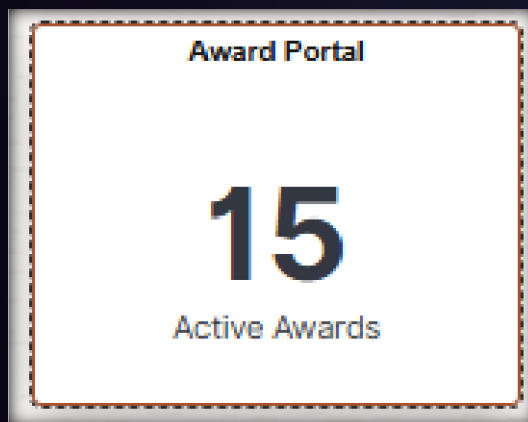
PUM 51

- 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 headq

This screenshot shows the 'Setup GM ALN Information' form. It includes a search bar at the top right. Below the title, there are fields for 'SetID', 'SHARE', and 'ALN 93.393'. A section titled 'ALN Detail' contains a search bar and a list of items. The form includes several input fields: '*Effective Date' (01/01/1901), '*Status' (Active), 'Agency ID' (HHS), '*Short Description' (Cancer Cause and Prevention Re), and '*Program Title' (Cancer Cause and Prevention Research). A character count '214 characters remaining' is shown at the bottom. At the bottom of the form are buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', and 'Include'.

This screenshot shows the 'Award Profile' form. It has a search bar at the top right. The form is divided into several tabs: 'Award', 'Funding', 'Resources', 'Certifications', 'Terms', 'Milestones', 'Key Words', and 'Funding Inquiry'. The 'Award' tab is selected. The form includes fields for 'Award ID' (CON000000000212), 'Reference Award Number' (1 RD1 CA217161-01), and 'Federal Award Identification Number' (1R01CA21761). Other fields include 'Title' (Grants Demo), 'Long Description' (Grants Demo), 'Award PI' (Schumacher, Kenneth), 'Sponsor' (National Cancer Institute), 'Prime Sponsor', 'Post Award Administrator', 'Purpose' (BARE), 'Status' (Accepted), 'Award Type' (Grant), 'ALN' (93.393), and 'Proposal ID' (CON000000000212). A character count '243 characters remaining' is shown. At the bottom right, there is a 'View Proposal' link.

- Added the Award Portal Insights dashboard to include a list of active awards by sponsor, principal investigator and billing specialist. Also provided are cost, budget and billing comparisons by award and project, recent funding modifications, award milestone status by assignee and type, anticipated funding from future award starts and proposals in progress.



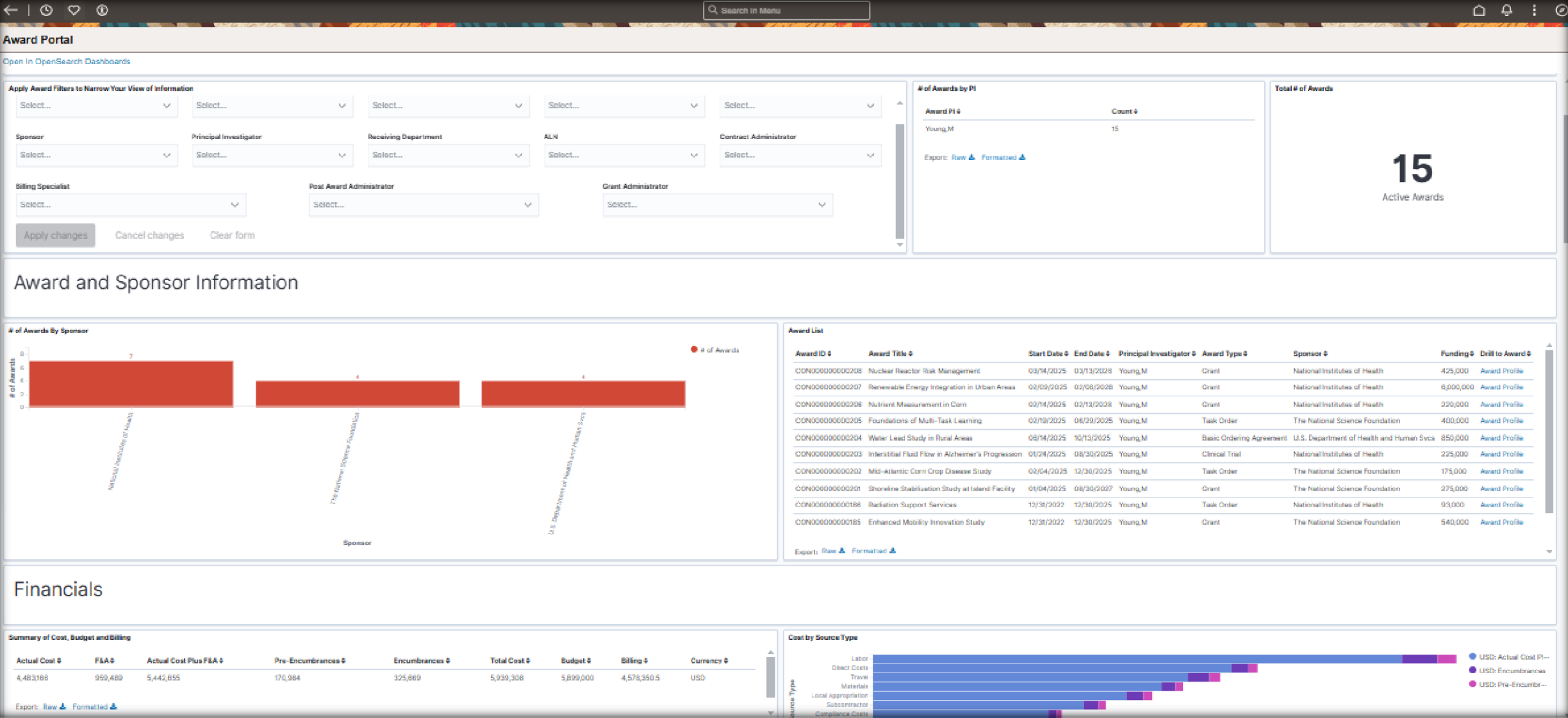
- Note: Available starting in PeopleTools 8.58, Kibana (now Open Search Dashboards) is a reporting and analytics tool that enables customers to build fast performing visualizations of data against PeopleSoft data that has been indexed in elastic search.

- Added the Award Portal Insights dashboard to include a list of active awards by sponsor, principal investigator and billing specialist. Also provided are cost, budget and billing comparisons by award and project, recent funding modifications, award milestone status by assignee and type, anticipated funding from future award starts and proposals in progress.

Demo

Award Portal Insights Dashboard

PUM 52



- Added the Cost Reimbursable Award Insights dashboard. Visualizations provide award and contract administrators comparisons of award cost, budget and billing by award, principal investigator, sponsor, project, contract type, award period, accounting year, and accounting period.



Cost Reimbursable Awards Insight

PUM 51

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

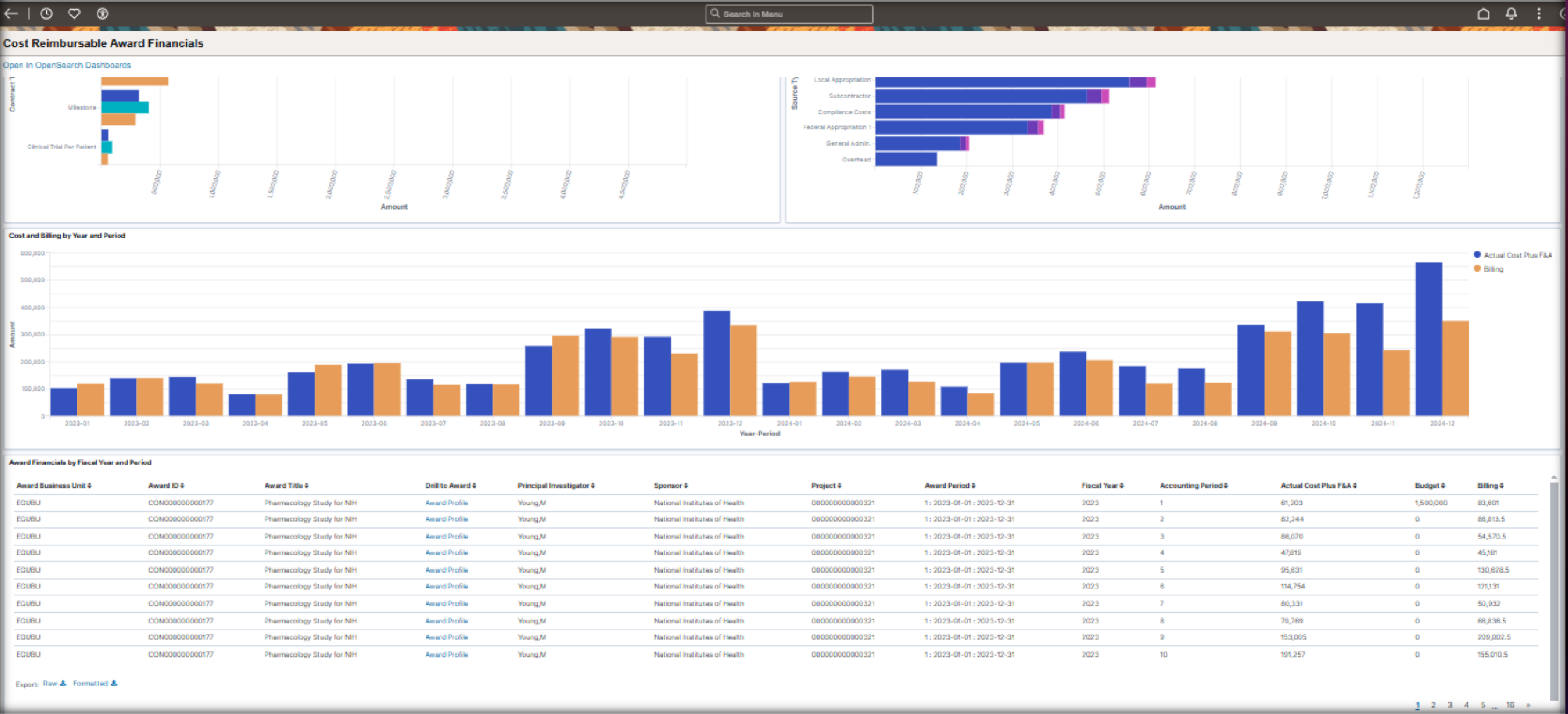
The screenshot displays the 'Cost Reimbursable Award Financials' dashboard. At the top, there is a search bar and a 'Search in Menu' button. Below this, a section titled 'Cost Reimbursable Award Financials' includes a link to 'Open In OpenSearch Dashboards'. A search bar with a 'DQL' button and a 'Refresh' button is present. Below the search bar, a row of filters is shown: 'Business Unit: EGUBU', 'Currency Code: USD', 'Award PI: Young, M', and 'Award End Date: 2025-03-04T11:11:14Z to 2035-03-04T11:11:14Z'. A '+ Add filter' button is also visible. A note states 'Business Unit and Currency are mandatory filters'. Below this, a grid of dropdown menus is displayed. The 'ALN' dropdown menu is highlighted with a red box. The 'ALN' dropdown menu is currently set to 'Select...'. Other dropdowns include 'Business Unit*', 'Currency*', 'Award Title', 'Award ID', 'Sponsor', 'Principal Investigator', 'Award Department', 'Contract Administrator', 'Contract Status', 'Fiscal Year', and 'Accounting Period'. At the bottom, there are buttons for 'Apply changes', 'Cancel changes', and 'Clear form'.

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

Demo

Cost Reimbursable Awards Insight

PUM 51



Award Profile Attachments

PUM 46

- Added visibility to the number of attachments on the milestone, funding, award modification, certification, and award pages in the Award profile component.

The screenshot displays the 'Award Profile' interface with a top navigation bar containing tabs: Award, Funding, Resources, Certifications, Terms, Milestones, Key Words, and Funding Inquiry. The 'Award' tab is active. The form includes the following fields and options:

- Award ID:** CON000000000212
- Reference Award Number:** 1 R01 CA217161-01
- Federal Award Identification Number:** 1R01CA21761
- Title:** Grants Demo
- Long Description:** Grants Demo (243 characters remaining)
- Award PI:** Schumacher, Kenneth
- Sponsor:** National Cancer Institute
- Prime Sponsor:** (empty field)
- Post Award Administrator:** (empty field)
- Purpose:** BARE
- Status:** Accepted
- Award Type:** Grant
- ALN:** 93.393
- Proposal ID:** CON000000000212
- Version ID:** AWD
- Start Date:** 11/01/2024
- End Date:** 10/30/2026
- ☒ Hold Billing on Unpaid Cost
- ☐ Hold Revenue on Unpaid Cost

At the bottom, there are several links: View Contract, Contract Rates, Additional Information, Grant Administrator, Sponsor Website, and a highlighted button labeled 'Maintain Attachments (2)'.

- PeopleSoft Enterprise Components delivers Notification Composer, which 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.

- 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.

PUM 51

Proposal/Award Key Words

PUM 46

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

The screenshot displays a web application interface for managing Proposal Key Words. At the top, there is a navigation bar with a search icon, a clock icon, a heart icon, and a search input field labeled "Search in Menu". Below this, the page title "Proposal Key Words" is visible. The main content area shows a form for editing a key word. The "SetID" is "SHARE" and the "Keyword" is "CANCER". The "Key Word Detail" section includes a search icon, a list icon, a "1 of 1" dropdown, and a "View All" link. The form fields are: "*Effective Date" with a date picker set to "01/01/1901", "*Status" with a dropdown set to "Active", and "*Description" with a text input field containing "Cancer - Now this is 100 Characters.....!". At the bottom, there is a row of buttons: "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Add", "Update/Display", "Include History", and "Correct History".

Proposal/Award Key Words

PUM 46

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

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Q Search in Menu

Award Profile

[Award](#) [Funding](#) [Resources](#) [Certifications](#) [Terms](#) [Milestones](#) **[Key Words](#)** [Funding Inquiry](#)

Award ID CON000000000212

Award Title Grants Demo

Reference Award Number 1 R01 CA217161-01

Award PI Schumacher,Kenneth

Primary Project PI Schumacher,Kenneth

Detail

🔍

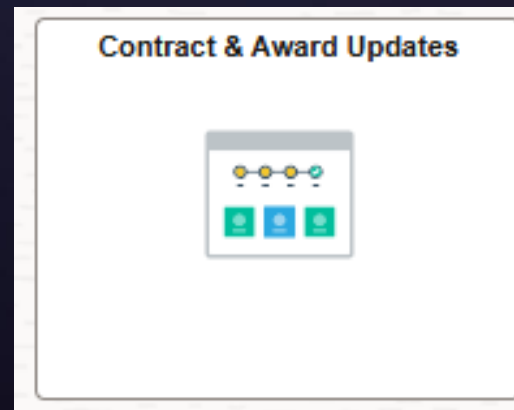
1-1 of 1

*Keyword	Description		
CANCER	Cancer - Now this is 100 Characters.....!	+	-

Go To:

[Sponsor](#) [Protocols](#) [Attributes](#) [Department Credit](#) [Notepad](#) [Award Modifications](#) [Supplemental Data](#)

- Enhanced Contracts and Grants to update awards and contracts details en masse using the Contract and Award Update Wizard. For Contracts, you can update Billing Specialist and Contract Administrator. For Grants, you can update the Assistance Listing Number, Award Reporting Roles, Award Status, Post Award Administrator, and Principal Investigator.



Contract & Award Update Wizard

PUM 52

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🔍 Search in Menu

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Contract & Award Update Wizard

1

2

3

4

Select Update Type

Enter Values

Select Contracts/Awards

Review and Submit

Restart

Next >

Update Type

*Description

Assistance Listing Number

Award Reporting Roles

Award Status

Billing Specialist

Contract Administrator

Post Award Administrator

Principal Investigator

Contract & Award Update Wizard

PUM 52

Search in Menu

Contract & Award Update Wizard

1

2

3

4

Update Type: Billing Specialist

Enter Values

Select Bill Plans

Review and Submit

Restart

< Previous

Next >

Enter Billing Specialist

*Contract Business Unit

EGUBU

*Billing Business Unit

EGUBU

*Billing Specialist

Albert Eastmoore

PUM 52



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Contract & Award Update Wizard

PUM 52

Search in Menu

Contract & Award Update Wizard

1

Update Type: Billing Specialist

2

Enter Values

3

Select Bill Plans

4

Review and Submit

Restart

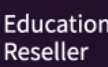
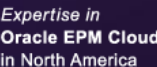
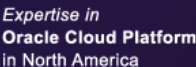
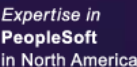
< Previous

Submit

Contracts

41 rows

Contract Business Unit ↕	Contract ↕	Description ↕	Billing Plan ID ↕	Billing Specialist ↕	New Billing Specialist ↕	
EGUBU	CON000000000092	Alzheimer's Disease Research P	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000094	Asthma in Older Adults	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000095	Basic and Preclinical Research	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000098	Research for NSF	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000098	Research for NSF	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000100	Reseach Grant for NSF	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000101	Nat Science LOC Uploads	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000101	Nat Science LOC Uploads	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000103	Research Grant for NSF	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000103	Research Grant for NSF	B102	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000109	Health and Safety Research	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000110	Phase 1 Initial Analysis	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000112	Phase 2 Research for NSF	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000113	Phase 3 Vaccine Analysis	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000150	Paid and Unpaid Cost	B101	Catherine O Toole	Albert Eastmoore	
EGUBU	CON000000000150	Paid and Unpaid Cost	B102	Catherine O Toole	Albert Eastmoore	



Contract & Award Update Wizard

PUM 52

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Search in Menu

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Contract & Award Update Wizard

Update Type Billing Specialist

Description Replace Billing Specialist - new hire

New Update

Update Summary

Business Unit ↕	Contract ↕	Billing Plan ID ↕	Field Name ↕	Old Value ↕	Old Description ↕	New Value ↕	New Description ↕	Updated By ↕	Datetime processed ↕
EGUBU	CON000000000092	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000094	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000095	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000098	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000098	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000100	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000101	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000101	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000103	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000103	B102	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000109	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000110	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000112	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000113	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM
EGUBU	CON000000000150	B101	BILLING_SPECIALIST	CMT	Catherine O Toole	ACE	Albert Eastmoore	Jessica Mann	03/05/25 3:15:22.000000PM

41 rows

📄 | 🔍 | ⌕

Contract & Award Update Wizard

PUM 52

Query Manager

Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-43 of 43 Last

Row	Contract	Billing Plan	Billing Method	Alloc Method	Short Desc	Descr	Billing Status	Hold	Date	Hold User	Reason	Line Type	BI Unit	Cycle ID	Bill Type	Source	Bill To	Addr Num	Bill To Contact	Bill By ID	Bill Inq	Bill	Percent Comp	Currency	Bill Cur	Max Line	Pre Approved	Direct Inv	Inv Form
1	CON0000000000092	B102	01	1		Letter of Credit Billing Templ	RDY	N					EGUBU	ON-DEMAND	GM	CONTRACTS	1018	1	1	GM_LOC	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_LOC
2	CON0000000000098	B102	01	1		As Incurred Billing Template	RDY	N					EGUBU	MTH-END	GM	CONTRACTS	1001	1	6	GM_CASH	703 882 7000	ARS	0.00000000	USD	D	0		N	GM_GEN
3	CON0000000000094	B102	01	1		Letter of Credit Billing Templ	RDY	N					EGUBU	ON-DEMAND	GM	CONTRACTS	1018	1	1	GM_LOC	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_LOC
4	CON0000000000095	B102	01	1		Letter of Credit Billing Templ	RDY	N					EGUBU	ON-DEMAND	GM	CONTRACTS	1018	1	1	GM_LOC	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_LOC
5	CON0000000000098	B101	01	1		As Incurred Billing Template	PRG	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0	N	N	GM_GEN
6	CON0000000000098	B102	01	1		As Incurred Billing Template	PND	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN
7	CON0000000000100	B101	01	1		As Incurred Billing Template	PRG	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN
8	CON0000000000101	B101	01	1		As Incurred Billing Template	RDY	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN
9	CON0000000000101	B102	01	1		As Incurred Billing Template	RDY	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN
10	CON0000000000103	B101	01	1		As Incurred Billing Template	RDY	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN
11	CON0000000000103	B102	01	1		As Incurred Billing Template	RDY	N					EGUBU	MTH-END	GM	CONTRACTS	GM004	1	1	GM_CASH	800-246-8000	ACE	0.00000000	USD	D	0		N	GM_GEN

Project Costing



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in North America*

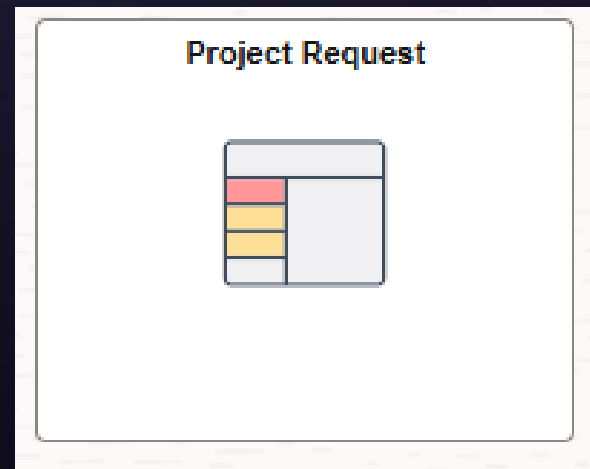
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Oracle EPM Cloud
in North America*

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- Added the Fluid Project Request activity guide providing organizations the ability to collect key project information from the requester such as business unit, description, start and end dates, project manager, location, team members, and activity information. Requests are routed to approvers using the approval workflow engine and available on the fluid approvals tile with options to add to or adjust submitted information as required.



Fluid Project Request

PUM 48

← | ⌚ | ♥

Project Request

Request Id

NEXT

Request Type

DEMO

Q

Request Description

Project Request Demo

Add

Clear

✕ Exit

Project Request

Next >

Questionnaire

Do you want to request a new project?

☒

Do you want to request new activities?

☐

Do you want to request new project team members?

☐

Do you want to complete the justification questionnaire?

☐

✕ Exit

Project Request

Request Id 000000000000006
Requester Jessica Mann
Description Project Request Demo

1 Project Request
Visited

2 Project Activity
Not Started

3 Project Team
Not Started

0

Basic Information

Request Type DEMO Demo

*Business Unit EGV05 EDUC & GVT - BU 5

*Project NEXT Copy

*Description

Long Description Project Request Demo

*Integration EGV05

*Start Date

*End Date

Project Manager

Project Manager Role

Project Type

Budgeted Amount

Currency Code USD

> Location Details

> Tree Details

> Rate Details

> Additional Information

Next >

Save for Later

Search in Menu

Project Request Status

Project Request 000000000000006 has been submitted for approval.

Request Id 000000000000006

Request Type DEMO

Request Description Project Request Demo

Requester Jessica Mann

Budgeted Amount 100,000.00 USD

Business Unit EGV05

Project NEXT

Start Date 03/01/2025

End Date 02/28/2026

Project Manager

Activity Detail

1 row

Activity	Description	Start Date	End Date
BUD	Year 1	03/01/2025	02/28/2026

Team Detail

1 row

Team Member	Project Role	Start Date	End Date
Schumacher,Kenneth	Principal Investigator	03/01/2025	02/28/2026

Next Steps

View Approvals

Create Project Request

Project and Activity User Fields

PUM 45

- Added the ability to set the labels for the Project and Activity User Fields.

Project and Activity User Field Labels

User Field Labels

	User Fields	Project User Field Label	Activity User Field Label
1	User Field 1	Reference Project ID	Reference Activity ID
2	User Field 2	Field 2	Field 2
3	User Field 3	Field 3	Field 3
4	User Field 4	Field 4	Field 4
5	User Field 5	Field 5	Field 5
6	User Currency	User Currency	User Currency
7	User Amount 1	Amount 1	Amount 1
8	User Amount 2	Amount 2	Amount 2
9	User Amount 3	Amount 3	Amount 3
10	User Date 1	Date 1	Date 1
11	User Date 2	Date 2	Date 2

Save Refresh

Define Project General Info

Phases Approval Justification **User Fields** Rates Attachments Asset Integration Rules Budget Alerts

Project 000000000000355 Description Grants Demo

User Fields

Reference Project ID	User Currency
Field 2	Amount 1
Field 3	Amount 2
Field 4	Amount 3
Field 5	Date 1
	Date 2

Save as Template Copy Project

My Projects Project Valuation Resources Project Activities Go To More

Save Return to Search Previous in List Next in List Refresh Add Update/Display Include History Correct History

Project and Activity User Fields

PUM 45

- Added the ability to set the labels for the Project and Activity User Fields.

Project and Activity User Field Labels

User Field Labels

	User Fields	Project User Field Label	Activity User Field Label
1	User Field 1	Reference Project ID	Reference Activity ID
2	User Field 2	Field 2	Field 2
3	User Field 3	Field 3	Field 3
4	User Field 4	Field 4	Field 4
5	User Field 5	Field 5	Field 5
6	User Currency	User Currency	User Currency
7	User Amount 1	Amount 1	Amount 1
8	User Amount 2	Amount 2	Amount 2
9	User Amount 3	Amount 3	Amount 3
10	User Date 1	Date 1	Date 1
11	User Date 2	Date 2	Date 2

Save Refresh

Update Project Activity

General Information Definition EA Rates Location Attachments Quality **User Fields** Rates

Project 000000000000355 Description Grants Demo
Activity BUD Description Grants Demo

User Fields

Reference Activity ID User Currency USD

Field 2 Amount 1

Field 3 Amount 2

Field 4 Amount 3

Field 5 Date 1

Date 2

Go To: Resources Activity Status Project Transactions Deliverables

Return to Project Activities

Save Return to Search Refresh Add Update/Display Include History Correct History

- Added a process to update year, period and journal date in Project Costing to match that used in General Ledger, which applies to transactions sent from Project Costing to General Ledger. This streamlines the monthly reconciliation of transactional data across the Project Costing and General Ledger applications.

Project Period and Year – Jmnl Gen

PUM 51

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🔍 Search in Menu

Query Manager

Records | Query | Expressions | Prompts | Fields | Criteria | Having | Dependency | Transformations | View SQL | **Run**

View All | Rerun Query | Download to Excel | Download to XML

First 1-8 of 8 Last

Row	Unit	Project	Activity	Trans ID	Trans ID From	Journal ID	Date	Year	Period	Account	An Type	Acctg Date	Status	Descr	Sys Source	BU Amount
1	EGV05	000000000000355	BUD	10040055	GEGV0500000007482025-02-1901			0	0	6007	BLD	02/19/2025	D		PRP	2304.440
2	EGV05	000000000000355	BUD	10040056	GEGV0500000007482025-02-1902			0	0	6018	BLD	02/19/2025	D		PRP	1440.270
3	EGV05	000000000000355	BUD	10040057	GEGV0500000007482025-02-1901	0000000748	02/19/2025	2025	2	6600	SFA	02/19/2025	D		BGM	1152.220
4	EGV05	000000000000355	BUD	10040059	GEGV0500000007482025-02-1902	0000000748	02/19/2025	2025	2	6600	SFA	02/19/2025	D		BGM	720.140
5	EGV05	000000000000355	BUD	10040061	10040057			0	0	6600	BLD	02/19/2025	D		PRP	1152.220
6	EGV05	000000000000355	BUD	10040062	10040059			0	0	6600	BLD	02/19/2025	D		PRP	720.140
7	EGV05	000000000000355	BUD	GEGV0500000007482025-02-1901	GEGV0500000007482025-02-1901	0000000748	02/19/2025	2025	2	6007	PAY	02/19/2025	I		BGL	2304.440
8	EGV05	000000000000355	BUD	GEGV0500000007482025-02-1902	GEGV0500000007482025-02-1902	0000000748	02/19/2025	2025	2	6018	PAY	02/19/2025	I		BGL	1440.270

Project Period and Year – Jrnl Gen

PUM 51

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Update Project GL Journal Info

Run Control ID

PSA_UPD_JRNL

Report Manager

Process Monitor

Run

Program Name

PSA_UPD_JRNL

Process Frequency

Always

Run Control Options ⓘ

🔍

|

|<

<

1 of 1

>

|>

View All

+

-

Request Number

1

*From Fiscal Year

2025

*Through Fiscal Year

2025

*From Period

1

*Through Period

2

Contract Options

Contracts Business Unit

🔍

Contract

🔍

Project Options

*BU/Proj/Act Option

Business Unit/Project

Project Business Unit

EGV05

Project

000000000000355

Project Period and Year – Jrnl Gen

PUM 51

← | ⌚ | ♥

Process Monitor

Process List | Server List

View Process Requests

User ID JMANN | Type | Server | Name | Run Status | Distribution Stat

Process List

Select	Instance	Seq.	Run Control ID
☐	311324		PSA_UPD_JRNL
☐	311323		CA_LOAD_UPD

Go back to Update Project GL Journal Info

Save | Notify

Process List | Server List

Process Detail

Process

Run

Date/Time

Message Log

Instance: 311324 | Type: Application Engine
Name: PSA_UPD_JRNL | Description: PSA_UPD_JRNL

1-5 of 5 | View All

Severity	Log Time	Message Text	Explain
10	4:26:03PM	Fiscal Year updated on 4 rows	Explain
10	4:26:03PM	Accounting Period updated on 4 rows.	Explain
10	4:26:03PM	Journal Date updated on 4 rows	Explain
	4:26:17PM	Published message with ID ce49bf6e-fb9a-11ef-9e1b-b7449c543b38 to create entry in folder GENERAL.	Explain
	4:26:17PM	Successfully posted generated files to the report repository	Explain

Return

OK | Cancel

Project Period and Year – Jmnl Gen

PUM 51

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Search in Menu

Query Manager

Records | Query | Expressions | Prompts | Fields | Criteria | Having | Dependency | Transformations | View SQL | **Run**

View All | Rerun Query | Download to Excel | Download to XML

First 1-8 of 8 Last

Row	Unit	Project	Activity	Trans ID	Trans ID From	Journal ID	Date	Year	Period	Account	An Type	Acctg Date	Status	Descr	Sys Source	BU Amount
1	EGV05	000000000000355	BUD	10040055	GEGV0500000007482025-02-1901		02/19/2025	2025	2	6007	BLD	02/19/2025	D		PRP	2304.440
2	EGV05	000000000000355	BUD	10040056	GEGV0500000007482025-02-1902		02/19/2025	2025	2	6018	BLD	02/19/2025	D		PRP	1440.270
3	EGV05	000000000000355	BUD	10040057	GEGV0500000007482025-02-1901	0000000748	02/19/2025	2025	2	6600	SFA	02/19/2025	D		BGM	1152.220
4	EGV05	000000000000355	BUD	10040059	GEGV0500000007482025-02-1902	0000000748	02/19/2025	2025	2	6600	SFA	02/19/2025	D		BGM	720.140
5	EGV05	000000000000355	BUD	10040061	10040057		02/19/2025	2025	2	6600	BLD	02/19/2025	D		PRP	1152.220
6	EGV05	000000000000355	BUD	10040062	10040059		02/19/2025	2025	2	6600	BLD	02/19/2025	D		PRP	720.140
7	EGV05	000000000000355	BUD	GEGV0500000007482025-02-1901	GEGV0500000007482025-02-1901	0000000748	02/19/2025	2025	2	6007	PAY	02/19/2025	I		BGL	2304.440
8	EGV05	000000000000355	BUD	GEGV0500000007482025-02-1902	GEGV0500000007482025-02-1902	0000000748	02/19/2025	2025	2	6018	PAY	02/19/2025	I		BGL	1440.270

- Enhanced the My Projects Automation feature to include an option for All Projects.

The screenshot shows the 'Installation Options' page with the 'Project Costing' tab selected. The 'My Projects Options' section is highlighted with a blue arrow pointing to a callout box. The callout box shows a dropdown menu with the following options: 'Auto Populate, Allow Overrides' (selected), 'Auto Populate, Allow Overrides', 'Auto Populate, No Overrides', and 'Manual Identification by Users'.

Note: In Image 10: Added a run control process that automatically populates the My Projects List for all Project Costing users. The process refreshes the project list for a user on a regular basis. This process supports the features and tasks that are available in the Project Management PeopleSoft Fluid User Interface.

- Enhanced the My Projects Automation feature to include an option for All Projects.

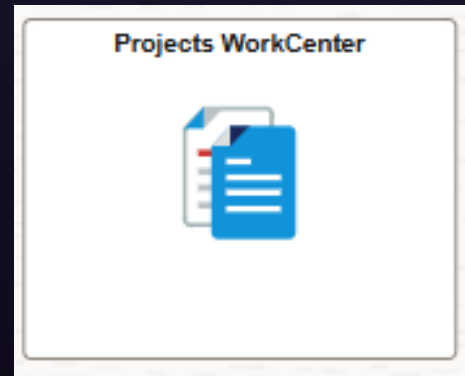
← | ⌚ | ❤️

Populate My Projects

User ID JMANN Run Control ID PC_MY_PRJ Process Monitor

Program Name PC_MY_PRJ Process Frequency Process Instance:311315

- Added the Fluid Projects WorkCenter providing users the ability to update project configuration en masse across the organization or by exception. New My Work pagelets provide actionable exceptions to update missing or invalid project managers, project user fields, project type and location information. A new Project Update Wizard feature provides users a guided process to update project, activity and team information most commonly updated including status, end date, project and activity user fields all from a modern fluid interface.



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Projects WorkCenter

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My Work

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Expired Projects with Active ... 41

Missing Project Fields 65

Missing Project User Fields 87

Missing and Inactive Project... 45

Inactive Project Team Memb...

Recurring Tasks

Budgets to Finalize 54

Deferred Billing

Project Data Compression 59

My Approvals

My Insights

Links

Project Setup

Project Update Wizard

My Projects

Populate My Projects

Define Project General Info

Define Project Activities

Award Teams

Missing Project Fields

65 rows

Actions ⌵ ⌵

Missing Fields %	Business Unit %	Project %	Description %	Project Status %	Start Date %	End Date %	Project Manager %	More
☐ Project Type	EGV05	000000000000163	The effects of insulin on labo	Approved	10/01/2004	09/30/2009		>
☐ Project Type	EGV05	000000000000179	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Project Type	EGV05	000000000000180	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Project Type	EGV05	000000000000181	cwb3	Approved	01/01/2012	12/31/2012		>
☐ Project Type	EGV05	000000000000182	CWB4DESCRIPT	Approved	03/01/2012	12/31/2012		>
☐ Project Type	EGV05	000000000000189	TEST	Approved	11/17/2012	11/17/2015		>
☐ Project Type	EGV05	000000000000190	TEST	Approved	11/17/2012	11/17/2015		>
☐ Project Type	EGV05	000000000000191	TEST	Approved	11/17/2012	11/17/2015		>
☐ Project Type	EGV05	000000000000192	The effects of insulin on labo	Approved	11/17/2012	11/18/2017		>
☐ Project Type	EGV05	000000000000193	The effects of insulin on labo	Approved	11/17/2012	11/18/2017		>
☐ Project Type	EGV05	000000000000194	TEST	Approved	11/17/2012	11/17/2015		>
☐ Project Type	EGV05	000000000000195	The effects of insulin on labo	Approved	11/17/2012	11/18/2017		>
☐ Project Type	EGV05	000000000000204	Using Rates for Revenue that a	Approved	10/01/2014	12/31/2014	Vincent.Sonya	>
☐ Project Type	EGV05	000000000000205	Amount Based Line with Separat	Approved	10/01/2014	12/31/2014	Vincent.Sonya	>
☐ Project Type	EGV05	000000000000353	ERROR_LOG_BI_INTERFACE-TITLE	Approved	09/01/2024	09/30/2024	Vincent.Sonya	>
☐ Project Type	EGV05	000000000000354	Pre-Award Example	Approved	02/19/2025	02/18/2030	Schumacher,Kenneth	>

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Projects WorkCenter

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My Work

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Deferred Billing

Project Data Compression 59

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My Insights

Links

Project Setup

Project Update Wizard

My Projects

Missing P

Actions

Update Missing Project User Fields

87 rows

⌵ 🔍 ⬆

Missing Field	Business Unit	Project	Description	Project Status	Start Date	End Date	Project Manager	More
☐ Reference Project ID	EGV05	000000000000163	The effects of insulin on labo	Approved	10/01/2004	09/30/2009		>
☐ Reference Project ID	EGV05	000000000000179	cwb2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000180	cwb2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000181	cwb3	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000182	CWB4DESCTITLE	Approved	03/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000189	TEST	Approved	11/17/2012	11/17/2015		>
☒ Reference Project ID	EGV05	000000000000190	TEST	Approved	11/17/2012	11/17/2015		>
☒ Reference Project ID	EGV05	000000000000191	TEST	Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000192	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000193	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000194	TEST	Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000195	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>

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Deferred Billing

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My Approvals

My Insights

Links

Project Setup

Project Update Wizard

My Projects

Regulate My Projects

Missing Project User Fields

87 rows

Actions ⌵

Missing Field ⌵	Business Unit ⌵	Project ⌵	Description ⌵	Project Status ⌵	Start Date ⌵	End Date ⌵	Project Manager ⌵	More
☐ Reference Project ID	EGV05	000000000000163	The effects of insulin on labo	Approved	10/01/2004	09/30/2009		>
☐ Reference Project ID	EGV05	000000000000179	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000180	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000181	cwb3	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000182		Approved	03/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000189		Approved	11/17/2012	11/17/2015		>
☒ Reference Project ID	EGV05	000000000000190		Approved	11/17/2012	11/17/2015		>
☒ Reference Project ID	EGV05	000000000000191		Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000192		Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000193	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000194	TEST	Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000195	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000204	Using Rates for Revenue that a	Approved	10/01/2014	12/31/2014	Vincent, Sonya	>

Cancel

Update Missing Project User Fields

Done

Reference Project ID

NEWVALUE

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Projects WorkCenter

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Project Data Compression 59

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My Insights

Links

Project Setup

Project Update Wizard

Missing Project User Fields

85 rows

Actions ⋮

Missing Field ↕	Business Unit ↕	Project ↕	Description ↕	Project Status ↕	Start Date ↕	End Date ↕	Project Manager ↕	More
☐ Reference Project ID	EGV05	000000000000163	The effects of insulin on labo	Approved	10/01/2004	09/30/2009		>
☐ Reference Project ID	EGV05	000000000000179	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000180	cwbd2	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000181	cwb3	Approved	01/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000182	CWB4DESCTITLE	Approved	03/01/2012	12/31/2012		>
☐ Reference Project ID	EGV05	000000000000189		Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000192		Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000193		Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000194	TEST	Approved	11/17/2012	11/17/2015		>
☐ Reference Project ID	EGV05	000000000000195	The effects of insulin on labo	Approved	11/17/2012	11/16/2017		>
☐ Reference Project ID	EGV05	000000000000204	Using Rates for Revenue that a	Approved	10/01/2014	12/31/2014	Vincent, Sonya	>
☐ Reference Project ID	EGV05	000000000000205	Amount Based Line with Separat	Approved	10/01/2014	12/31/2014	Vincent, Sonya	>

2 row(s) updated

OK

Search in Menu

Define Project General Info

<

Phases

Approval

Justification

User Fields

Rates

Attachments

Asset Integration Rules

Budget Alerts

>

Project

000000000000190

Description

TEST

User Fields

Reference Project ID

NEWVALUE

Field 2

Field 3

Field 4

Field 5

User Currency

Amount 1

Amount 2

Amount 3

Date 1

Date 2

Save as Template

Copy Project

My Projects

Project Valuation

Resources

Project Activities

Go To

More

Save

Return to Search

Refresh

Add

Update/Display

Include History

Correct History

- Added a My Work Exception to the fluid Project Costing WorkCenter that identifies inactive project team members. This actionable exception provides you the ability to replace a terminated employee on the project team with another employee.

The screenshot displays the 'Projects WorkCenter' interface. On the left, a sidebar menu includes 'My Work', 'Setup and Maintenance Exceptions', and 'Recurring Tasks'. Under 'Setup and Maintenance Exceptions', 'Missing and Inactive Project Managers' is highlighted with a blue box and a count of 4. The main content area is titled 'Missing and Inactive Project Managers' and shows a table with 4 rows. The table has columns for Business Unit, Project, Description, Manager, Manager Status, Role, Schedule End, Project End Date, and More. The first three rows are for training and implementation projects, while the last two rows show project managers Maertens, Betsy and Gunter, Joanne.

Business Unit	Project	Description	Manager	Manager Status	Role	Schedule End	Project End Date	More
US001	000000000000293	Hourly Training					06/30/2025	>
US001	000000000000306	Implement Transportation Plan					12/31/2025	>
US001	ALLPROJECTS	All Projects	Maertens, Betsy	Active	Current Project Manager	12/31/2004	12/31/2025	>
US001	CORRECTIVE	Corrective Maintenance	Gunter, Joanne		Current Project Manager	12/31/2031	12/31/2031	>

- Added a My Work exception on the fluid Project Costing WorkCenter to review and update deferred billings. The exception allows users to update the billing date for deferred billing transactions, place a contract bill plan on hold or remove a hold.

The screenshot displays the 'Projects WorkCenter' interface. On the left, a sidebar lists various tasks under 'My Work' and 'Recurring Tasks'. The main area shows a table titled 'Expired Projects with Active Status' with 41 rows. A blue box highlights the 'Actions' menu for a selected row, which includes 'Update Status' and 'Update End Date' options.

Business Unit	Project	Description	Start Date	End Date	Project Status	More
EGV05	0000000000000163	The effects of insulin on labo	10/01/2004	09/30/2009	Approved	>
EGV05	0000000000000179	cwbd2	01/01/2012	12/31/2012	Approved	>
EGV05	0000000000000180	cwbd2	01/01/2012	12/31/2012	Approved	>
EGV05	0000000000000181	cwb3	01/01/2012	12/31/2012	Approved	>
EGV05	0000000000000182	CWB4DESCTITLE	03/01/2012	12/31/2012	Approved	>
EGV05	0000000000000189	TEST	11/17/2012	11/17/2015	Approved	>

- Added a My Work exception on the fluid Project Costing WorkCenter to review and update deferred billings. The exception allows users to update the billing date for deferred billing transactions, place a contract bill plan on hold or remove a hold.

Deferred Billing

My Work

Setup and Maintenance Exceptions

Expired Projects with Active ... 41

Missing Project Fields 65

Missing Project User Fields 85

Missing and Inactive Project... 4

Inactive Project Team Memb...

Recurring Tasks

Budgets to Finalize 54

Deferred Billing 8

Project Data Compression 59

Deferred Billing

Actions

8 rows

Amount and Dates		Bill Plan Details		Project Chartfield Details		Contract Details		General Ledger Details				
☐ Projects Business Unit	Project	Project Name	Billing Date	Amount	Plan ID	Plan Description	Plan Status	On Hold	Hold Reason	Hold Date	Held By	Bill To Customer
☐ US001	0000000000000294	Onsite Center	06/30/2024	\$75.00	B101	Onsite Centers	Ready	No				Golden Inc.
☐ US001	0000000000000292	Year 1 Support	04/30/2024	\$30.00	B101	Year 1 Support	Ready	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
☐ US001	0000000000000294	Onsite Center	03/31/2024	\$3,300.00	B101	Onsite Centers	Ready	No				Golden Inc.
☐ US001	0000000000000292	Year 1 Support	10/31/2023	\$2,250.00	B101	Year 1 Support	Ready	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
☐ US001	0000000000000294	Onsite Center	08/31/2023	\$1,350.00	B101	Onsite Centers	Ready	No				Golden Inc.
☐ US001	0000000000000294	Onsite Center	03/31/2023	\$1,800.00	B101	Onsite Centers	Ready	No				Golden Inc.

- Added a My Work exception on the fluid Project Costing WorkCenter to review and update deferred billings. The exception allows users to update the billing date for deferred billing transactions, place a contract bill plan on hold or remove a hold.

The screenshot displays the Oracle Projects Fluid WorkCenter interface. The main section is titled 'Deferred Billing' and shows a table of transactions. A modal window titled 'Update Billing Date' is open, allowing the user to update the billing date for a selected project. The modal has a 'Cancel' button and a 'Done' button. The background table has columns for 'Amount and Dates', 'Bill Plan Detail', 'On Hold', 'Hold Reason', 'Hold Date', 'Held By', and 'Bill To Customer'. The table shows 8 rows of data.

Amount and Dates	Bill Plan Detail	On Hold	Hold Reason	Hold Date	Held By	Bill To Customer
☐ Projects Business Unit	Project					
☒ US001	000000000000	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
☐ US001	000000000000	No				Golden Inc.
☐ US001	000000000000	No				Golden Inc.
☐ US001	000000000000	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
☐ US001	000000000000	No				Golden Inc.
☐ US001	000000000000	No				Golden Inc.

- Added a My Work exception on the fluid Project Costing WorkCenter to review and update deferred billings. The exception allows users to update the billing date for deferred billing transactions, place a contract bill plan on hold or remove a hold.

Deferred Billing

My Work

Setup and Maintenance Exceptions

- Expired Projects with Active ... 41
- Missing Project Fields 65
- Missing Project User Fields 85
- Missing and Inactive Project... 4
- Inactive Project Team Memb...

Recurring Tasks

- Budgets to Finalize 54
- Deferred Billing 8
- Project Data Compression 59

Deferred Billing

8 rows

Amount and Dates	Bill Plan Details	Project Chartfield Details	Contract Details	General Ledger Details								
Project Business Unit	Project	Project Name	Billing Date	Amount	Plan ID	Plan Description	Plan Status	On Hold	Hold Reason	Hold Date	Held By	Bill To Customer
US001	000000000000292	Year 1 Support	03/07/2025	\$30.00	B101	Year 1 Support	Ready	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
US001	000000000000294	Onsite Center				Onsite Centers	Ready	No				Golden Inc.
US001	000000000000294	Onsite Center				Onsite Centers	Ready	No				Golden Inc.
US001	000000000000292	Year 1 Support	10/31/2023	\$2,250.00	B101	Year 1 Support	Ready	Yes	TEMPORARY HOLD	01/05/2023	Mimi Young	Apex Systems
US001	000000000000294	Onsite Center	08/31/2023	\$1,350.00	B101	Onsite Centers	Ready	No				Golden Inc.
US001	000000000000294	Onsite Center	03/31/2023	\$1,800.00	B101	Onsite Centers	Ready	No				Golden Inc.

1 row(s) updated.

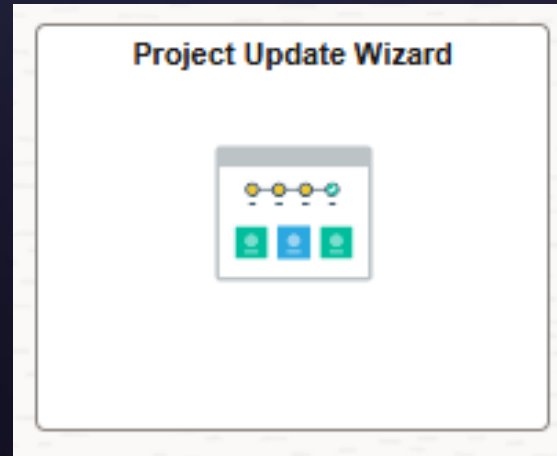
OK

- Added a My Work exception on the fluid Project Costing WorkCenter to review and update deferred billings. The exception allows users to update the billing date for deferred billing transactions, place a contract bill plan on hold or remove a hold.

The screenshot shows the Oracle Projects Fluid WorkCenter interface. On the left is a navigation menu with sections like 'My Work', 'Setup and Maintenance Exceptions', and 'Recurring Tasks'. The 'Deferred Billing' section is highlighted. The main area displays a table titled 'Deferred Billing' with 8 rows. A modal dialog box is open, indicating that all rows for the selected bill plan(s) were updated. The table columns include Project, Amount, Plan ID, Plan Description, Status, and Hold status.

Projects Business Unit	Project	Project Name	Billing Date	Amount	Plan ID	Plan Description	Plan Status	On Hold	Hold Reason	Hold Date	Held By	Bill To Customer
US001	000000000000292	Year 1 Support	03/07/2025	\$30.00	B101	Year 1 Support	Ready	No				Apex Systems
US001	000000000000294	Onsite Ce				Centers	Ready	No				Golden Inc.
US001	000000000000294	Onsite Ce				Centers	Ready	No				Golden Inc.
US001	000000000000292	Year 1 Support	10/31/2023	\$2,250.00	B101	Year 1 Support	Ready	No				Apex Systems
US001	000000000000294	Onsite Center	08/31/2023	\$1,350.00	B101	Onsite Centers	Ready	No				Golden Inc.
US001	000000000000294	Onsite Center	03/31/2023	\$1,800.00	B101	Onsite Centers	Ready	No				Golden Inc.

- Enhanced the Project Update Wizard feature to update project teams. This feature allows you to update multiple projects in a single action, adding new project team members, their project role, and scheduled start and end dates.



- Enhanced the Project Update Wizard to update Project Template Status en masse.

Projects Update Wizard

PUM 43

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Search in Menu

Projects Update Wizard

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

*Update Type

*Update Description

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

Restart Save For Later Next >

- With Program Management/Proposal Management turned on

Projects Update Wizard

PUM 43

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Search in Menu

Projects Update Wizard

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

*Update Type

*Update Description

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

Restart Save For Later Next >

- With Program Management/Proposal Management turned off

Projects Update Wizard

PUM 43

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🔍 Search in Menu

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Projects Update Wizard

1

2

3

4

Select Update Type

Enter New Values

Select Projects & Activities

Review and Submit

*Update Type

Project Team

▼

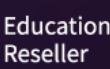
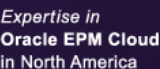
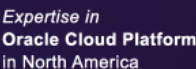
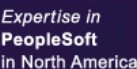
*Update Description

Update Project Team

Restart

Save For Later

Next >



Projects Update Wizard

PUM 43

Search in Menu

Projects Update Wizard

1

2

3

4

Select Update Type

Enter New Values

Select Projects & Activities

Review and Submit

Restart

Save For Later

< Previous

Next >

Enter New Project Manager

*New Project Manager

KU0010

Name

Vincent,Sonya

*Start Date

03/01/2025

*SetID

SHARE

*New Project Role

PI

Description

Principal Investigator

Projects Update Wizard

PUM 43

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🔍 Search in Menu

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Projects Update Wizard

1

Select Update Type

2

Enter New Values

3

Select Projects & Activities

4

Review and Submit

Restart

Save For Later

< Previous

Next >

▼ Select Projects

Business Unit

EGV05

🔍

Project

🔍

Project Description

Project Processing Status

▼

Project Type

🔍

Project Status

🔍

From Start Date

📅

To Start Date

📅

From End Date

📅

To End Date

📅

Project Manager

Schumacher,Kenneth

🔍

Grants Project

Grants Object

▼

Search

Clear

Projects

45 rows

☐

Business Unit

↑↓

☒

EGV05

☐

EGV05

☒

EGV05

☐

EGV05

☒

EGV05

☐

EGV05

Project

↑↓

000000000000354

000000000000355

000000000000356

000000000000358

000000000000359

000000000000360

Description

↑↓

Pre-Award Example

Grants Demo

Pivot Grid Example

Prepaid Test

Prepaid Test

Prepaid Test

Processing Status

↑↓

Active

Active

Active

Active

Active

Active

Project Type

↑↓

Project Manager

↑↓

Schumacher,Kenneth

Schumacher,Kenneth

Schumacher,Kenneth

Schumacher,Kenneth

Schumacher,Kenneth

Schumacher,Kenneth

Start Date

↑↓

02/19/2025

11/01/2024

01/01/2025

02/01/2025

02/01/2025

02/01/2025

End Date

↑↓

02/18/2030

10/30/2026

12/31/2029

01/31/2026

01/31/2026

01/31/2026

PUM 43



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PeopleSoft
in North America

Expertise in
Oracle Cloud Platform
in North America

Expertise in
Oracle EPM Cloud
in North America

Gartner.
Recognized Vendor



PUM 43

[Update Description](#) [Update Project Manager](#)

New Update

Projects

ROWS

Projects Update Wizard

PUM 43

Search in Menu

Establish Project General Info

General Information

Project Department

Project Costing Definition

Primavera

Manager

Location

Phases

Approval

Project

000000000000354

Description

Pre-Award Example

Project Manager

1 of 1

View All

Effective Date

03/01/2025

Manager Name

Sonya Vincent

Project Role

PI

Start Date

03/01/2025

End Date

02/18/2030

Save as Template

Copy Project

My Projects

Project Valuation

Project Team

Project ActivitiesGo

More

To

Save

Return to Search

Refresh

Add

Update/Display

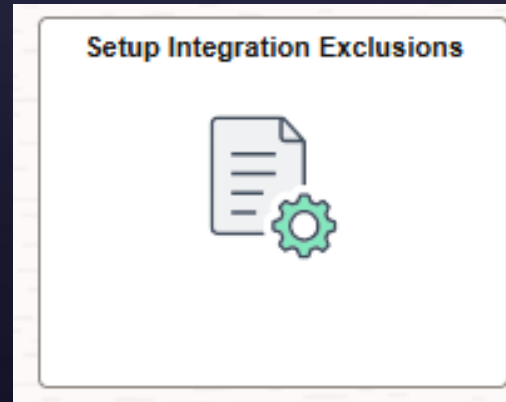
Include History

Correct History

Exclude from Integrations

PUM 50

- Added a new configuration page to identify the types of transactions to exclude from integrations with Expenses, General Ledger, and Payables.



PUM 50



Exclude from Integrations

PUM 50

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Process Monitor

Process List | Server List

View Process Requests

User ID: JMANN | Type: | Server: | Name: | Run Status: | Distribution Stat:

Process List

Select	Instance	Seq.	Run Control ID
☐	311346		PC_GL_TO_PC
☐	311345		ONLJPJMANN00000000
☐	311344		ONLJEJMANN00000000

Go back to General Ledger

Save | Notify

Process

Run

Date/Time

OK

Process Detail

Message Log

Instance: 311346 | Type: Application Engine
Name: PC_GL_TO_PC | Description: GL to PC Interface

1-8 of 8 | View All

Severity	Log Time	Message Text	Explain
10	10:29:26AM	2 row(s) marked in JRNL_LN for exclusion from Projects integration.	Explain
10	10:29:27AM	0 Row(s) Processed	Explain
10	10:29:35AM	Using Processing Order Template CA_DEFAULT	Explain
10	10:29:37AM	Initializing process PC_BUD_SUM.	Explain
10	10:29:37AM	'PC_BUD_SUM' has inserted 0 rows into PS_PC_BUD_SUMMARY.	Explain
10	10:29:37AM	0 rows successfully written to Budget Summary table.	Explain
	10:29:40AM	Published message with ID 1a313c86-fdbc-11ef-88d1-a33d2a52981f to create entry in folder GENERAL.	Explain
	10:29:40AM	Successfully posted generated files to the report repository	Explain

Return

Customer Contracts



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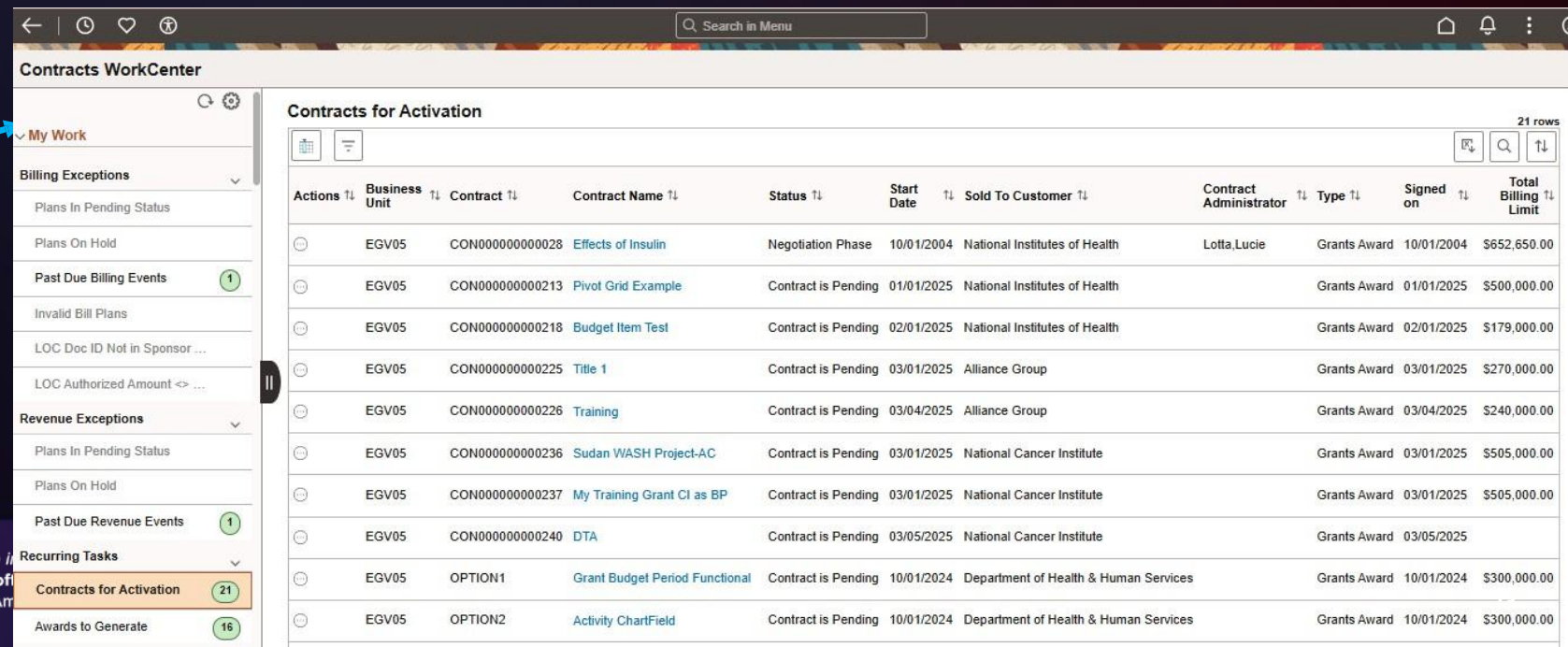
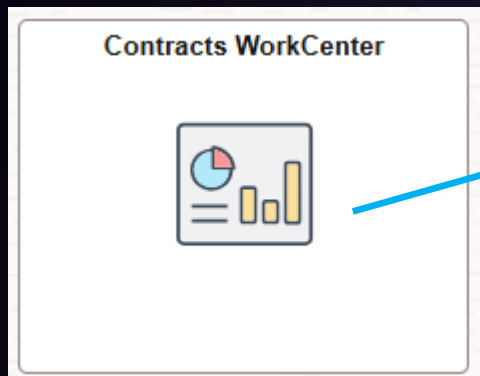
*Expertise in
Oracle EPM Cloud
in North America*



Fluid Contracts WorkCenter

PUM 49

- Added the Fluid Customer Contracts WorkCenter providing contract administrators actionable My Work exceptions in the areas of contract billing and revenue including plans in pending status, plans on hold, and past due events not yet billed or recognized for revenue. In addition, administrators can replace inactive billing specialists en masse, activate contracts en masse, and fix letter of credit discrepancies to match sponsor funding information.



The screenshot shows the "Contracts WorkCenter" interface. On the left is a sidebar with a "My Work" section containing "Billing Exceptions" and "Revenue Exceptions". The "Contracts for Activation" menu item is highlighted in orange. The main area displays a table of contracts for activation.

Actions	Business Unit	Contract	Contract Name	Status	Start Date	Sold To Customer	Contract Administrator	Type	Signed on	Total Billing Limit
	EGV05	CON0000000000028	Effects of Insulin	Negotiation Phase	10/01/2004	National Institutes of Health	Lotta, Lucie	Grants Award	10/01/2004	\$652,650.00
	EGV05	CON00000000000213	Pivot Grid Example	Contract is Pending	01/01/2025	National Institutes of Health		Grants Award	01/01/2025	\$500,000.00
	EGV05	CON00000000000218	Budget Item Test	Contract is Pending	02/01/2025	National Institutes of Health		Grants Award	02/01/2025	\$179,000.00
	EGV05	CON00000000000225	Title 1	Contract is Pending	03/01/2025	Alliance Group		Grants Award	03/01/2025	\$270,000.00
	EGV05	CON00000000000226	Training	Contract is Pending	03/04/2025	Alliance Group		Grants Award	03/04/2025	\$240,000.00
	EGV05	CON00000000000236	Sudan WASH Project-AC	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
	EGV05	CON00000000000237	My Training Grant CI as BP	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
	EGV05	CON00000000000240	DTA	Contract is Pending	03/05/2025	National Cancer Institute		Grants Award	03/05/2025	
	EGV05	OPTION1	Grant Budget Period Functional	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00
	EGV05	OPTION2	Activity ChartField	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00

Fluid Contracts WorkCenter

PUM 49

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Q Search in Menu

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Contracts WorkCenter

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My Work

Billing Exceptions

Plans In Pending Status

Plans On Hold

Past Due Billing Events 1

Invalid Bill Plans

LOC Doc ID Not in Sponsor ...

LOC Authorized Amount <> ...

Revenue Exceptions

Plans In Pending Status

Plans On Hold

Past Due Revenue Events 1

Recurring Tasks

Contracts for Activation 21

Awards to Generate 16

Contracts for Activation

21 rows

⌵

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Act	Contract	Contract Name	Status	Start Date	Sold To Customer	Contract Administrator	Type	Signed on	Total Billing Limit
⋮	CON000000000028	Effects of Insulin	Negotiation Phase	10/01/2004	National Institutes of Health	Lotta, Lucie	Grants Award	10/01/2004	\$652,650.00
⋮	EGV05 CON0000000000213	Pivot Grid Example	Contract is Pending	01/01/2025	National Institutes of Health		Grants Award	01/01/2025	\$500,000.00
⋮	EGV05 CON0000000000218	Budget Item Test	Contract is Pending	02/01/2025	National Institutes of Health		Grants Award	02/01/2025	\$179,000.00
⋮	EGV05 CON0000000000225	Title 1	Contract is Pending	03/01/2025	Alliance Group		Grants Award	03/01/2025	\$270,000.00
⋮	EGV05 CON0000000000226	Training	Contract is Pending	03/04/2025	Alliance Group		Grants Award	03/04/2025	\$240,000.00
⋮	EGV05 CON0000000000236	Sudan WASH Project-AC	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
⋮	EGV05 CON0000000000237	My Training Grant CI as BP	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
⋮	EGV05 CON0000000000240	DTA	Contract is Pending	03/05/2025	National Cancer Institute		Grants Award	03/05/2025	
⋮	EGV05 OPTION1	Grant Budget Period Functional	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00
⋮	EGV05 OPTION2	Activity ChartField	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00

Fluid Contracts WorkCenter

PUM 49

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Contracts WorkCenter

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My Work

Billing Exceptions

Plans In Pending Status

Plans On Hold

Past Due Billing Events 1

Invalid Bill Plans

LOC Doc ID Not in Sponsor ...

LOC Authorized Amount <> ...

Revenue Exceptions

Plans In Pending Status

Plans On Hold

Past Due Revenue Events 1

Recurring Tasks

Contracts for Activation 21

Awards to Generate 16

Contracts for Activation

Actions

Activate Contracts

21 rows

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☐	Business Unit	Contract	Contract Name	Status	Start Date	Sold To Customer	Contract Administrator	Type	Signed on	Total Billing Limit
☒	EGV05	CON000000000028	Effects of Insulin	Negotiation Phase	10/01/2004	National Institutes of Health	Lotta, Lucie	Grants Award	10/01/2004	\$652,650.00
☒	EGV05	CON0000000000213	Pivot Grid Example	Contract is Pending	01/01/2025	National Institutes of Health		Grants Award	01/01/2025	\$500,000.00
☒	EGV05	CON0000000000218	Budget Item Test	Contract is Pending	02/01/2025	National Institutes of Health		Grants Award	02/01/2025	\$179,000.00
☐	EGV05	CON0000000000225	Title 1	Contract is Pending	03/01/2025	Alliance Group		Grants Award	03/01/2025	\$270,000.00
☐	EGV05	CON0000000000226	Training	Contract is Pending	03/04/2025	Alliance Group		Grants Award	03/04/2025	\$240,000.00
☐	EGV05	CON0000000000236	Sudan WASH Project-AC	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
☐	EGV05	CON0000000000237	My Training Grant CI as BP	Contract is Pending	03/01/2025	National Cancer Institute		Grants Award	03/01/2025	\$505,000.00
☐	EGV05	CON0000000000240	DTA	Contract is Pending	03/05/2025	National Cancer Institute		Grants Award	03/05/2025	
☐	EGV05	OPTION1	Grant Budget Period Functional	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00
☐	EGV05	OPTION2	Activity ChartField	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00
☐	EGV05	OPTION3	Project ChartField	Contract is Pending	10/01/2024	Department of Health & Human Services		Grants Award	10/01/2024	\$300,000.00

- Enhanced the Fluid Contracts WorkCenter to update proposal submission status, generate pre-award projects, and generate awards en masse across the organization.

Fluid Contracts WorkCenter

PUM 50

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🔍 Search in Menu

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Contracts WorkCenter

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My Work

Billing Exceptions

Plans In Pending Status

Plans On Hold

Past Due Billing Events 1

Invalid Bill Plans

LOC Doc ID Not in Sponsor ...

LOC Authorized Amount <> ...

Revenue Exceptions

Plans In Pending Status

Plans On Hold

Past Due Revenue Events 1

Recurring Tasks

Contracts for Activation 21

Awards to Generate 16

...	CON000000000024	V1	Initial Draft	Draft	Not Submitted	Not Generated	10/01/2004	Schumacher,Kenneth	\$500,000.00
...	CON000000000199	V101	GPS Assurance Study	Submitted	Submitted	Not Generated	02/15/2025	Tran,Corrine	\$40,400.00
...	EGV05 CON000000000200	V101	River Surface Area	Draft	Not Submitted	Not Generated	01/20/2025	Young,M	\$19,200.00
...	EGV05 CON000000000211	V101	Initial Draft	Submitted	Not Submitted	Pre-Award Spending	02/19/2025	Schumacher,Kenneth	\$500,000.00
...	EGV05 CON000000000214	V101	Grants Demo	Draft	Not Submitted	Not Generated	02/01/2025	Schumacher,Kenneth	0.00
...	EGV05 CON000000000221	V101	Derek's Training Pro	Draft	Not Submitted	Not Generated	02/24/2025	Tran,Corrine	0.00
...	EGV05 CON000000000223	V101	Sample Form	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
...	EGV05 CON000000000224	V101	Project Title	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
...	EGV05 CON000000000227	V101	Grants Testing KLOVE	Draft	Not Submitted	Not Generated	10/01/2024	Fuller,Chloe	\$152,650.00
...	EGV05 CON000000000238	V101	MLL	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
...	EGV05 CON000000000239	V101	AB Test	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00

Fluid Contracts WorkCenter

PUM 50

Contracts WorkCenter

My Work

Billing Exceptions

Plans In Pending Status

Plans On Hold

Past Due Billing Events 1

Invalid Bill Plans

LOC Doc ID Not in Sponsor ...

LOC Authorized Amount <> ...

Revenue Exceptions

Plans In Pending Status

Plans On Hold

Past Due Revenue Events 1

Recurring Tasks

Contracts for Activation 21

Awards to Generate 16

Actions

Submit Proposal

Generate PreAward

Generate Award

Update Status

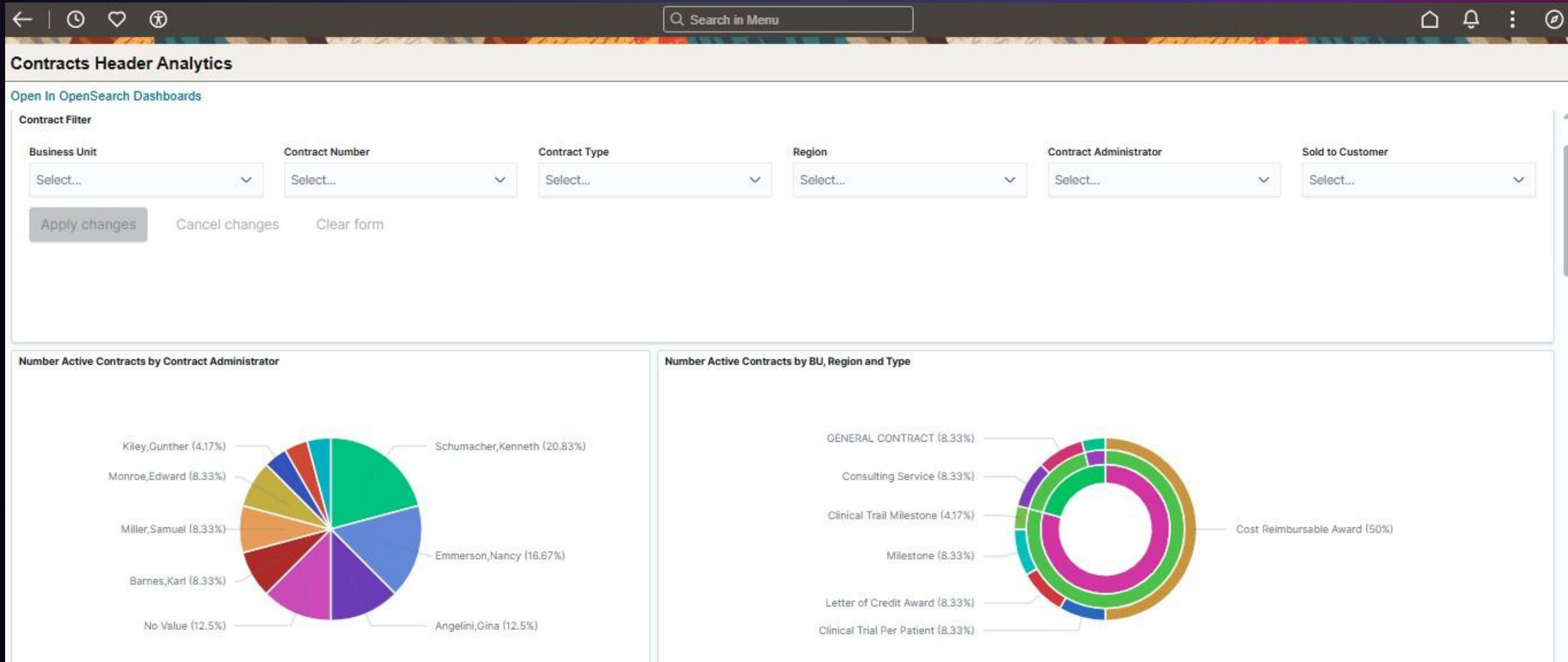
Search in Menu

16 row

Business Unit	Version	Description	Proposal Status	Proposal Submission Status	Award Status	Begin Date	PI Name	Target Sponsor Budget
EGV05	CON000000000024 V1	Initial Draft	Draft	Not Submitted	Not Generated	10/01/2004	Schumacher,Kenneth	\$500,000.00
EGV05	CON0000000000199 V101	GPS Assurance Study	Submitted	Submitted	Not Generated	02/15/2025	Tran,Corrine	\$40,400.00
EGV05	CON0000000000200 V101	River Surface Area	Draft	Not Submitted	Not Generated	01/20/2025	Young,M	\$19,200.00
EGV05	CON0000000000211 V101	Initial Draft	Submitted	Not Submitted	Pre-Award Spending	02/19/2025	Schumacher,Kenneth	\$500,000.00
EGV05	CON0000000000214 V101	Grants Demo	Draft	Not Submitted	Not Generated	02/01/2025	Schumacher,Kenneth	0.00
EGV05	CON0000000000221 V101	Derek's Training Pro	Draft	Not Submitted	Not Generated	02/24/2025	Tran,Corrine	0.00
EGV05	CON0000000000223 V101	Sample Form	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
EGV05	CON0000000000224 V101	Project Title	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
EGV05	CON0000000000227 V101	Grants Testing KLOVE	Draft	Not Submitted	Not Generated	10/01/2024	Fuller,Chloe	\$152,650.00
EGV05	CON0000000000238 V101	MLL	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00
EGV05	CON0000000000239 V101	ABTest	Draft	Not Submitted	Not Generated	03/01/2025	Schumacher,Kenneth	0.00

- Adopted the PeopleTools change from Kibana to PeopleSoft Insights for Customer Contracts. All dashboard roles now refer to Insights and security changes are made for content references as well as roles and user profiles.





Billing

- Enhanced the Billing Interface process to run by bill source in addition to interface ID and business unit.

The screenshot shows the 'Process Billing Interface' web application. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a search bar labeled 'Search in Menu'. Below the navigation bar, the title 'Process Billing Interface' is displayed. The main content area features a 'Run Control ID' field with the value 'INTFC_BI'. To the right of this field are links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below these elements, there is a 'Range Selection' section with three radio buttons: 'Interface ID', 'Business Unit', and 'Bill Source'. The 'Bill Source' option is selected. To the right of the 'Range Selection' section, there are three input fields: 'From Business Unit' with the value 'EGV05', 'To Business Unit' with the value 'EGV05', and 'Source' with the value 'CONTRACTS'. Each input field has a search icon. At the bottom of the form, there is a row of buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

← | 🕒 ❤️ 🔍 Search in Menu

Process Billing Interface

Run Control ID INTFC_BI Report Manager Process Monitor Run

Range Selection

☐ Interface ID

☐ Business Unit

☒ Bill Source

From Business Unit EGV05 🔍

To Business Unit EGV05 🔍

Source CONTRACTS 🔍

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

Invoice Sender Email Address

PUM 45

- Enhanced the email that is generated when an invoice is sent, to include a From email address, in place of the original system email address. This From email address is configured for a business unit or bill type.

The screenshot displays the 'Billing Definition' configuration page for 'Business Unit 4'. The page includes several sections: 'VAT Information' with a 'VAT Reporting Entity' field; 'Invoice Approval Options' with checkboxes for 'Enable Invoice Approvals', 'Only Submit Credits', and 'Enable Worksheet Approval', along with a 'Process ID' search field; 'Details' with a checked 'Attach Invoice Image Option'; 'Credit Cards' with a 'Default Credit Card Group' search field; 'Threshold' with a 'Threshold' checkbox; and 'Invoice Email Option' (highlighted with a red box) with a 'From Email Address' field containing 'invoicing@spearmc.com' and an 'Exclude Credit Invoice Emails' checkbox. At the bottom, there is an 'Express Bill Entry Template' search field and buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. The breadcrumb at the bottom reads 'Business Unit 1 | Business Unit 2 | Business Unit 3 | Business Unit 4'.

Invoice Sender Email Address

PUM 45

- Enhanced the email that is generated when an invoice is sent, to include a From email address, in place of the original system email address. This From email address is configured for a business unit or bill type.

The screenshot shows the Oracle Billing Type configuration interface. At the top, there are tabs for 'Bill Type 1', 'Bill Type 2' (selected), and 'Bill Type 3'. Below the tabs, there are fields for 'SetID', 'SHARE', 'Bill Type', and 'GM'. The main section is titled 'Billing Type 2' and contains various configuration options. The 'Invoice Email Option' section is highlighted with a red box and contains the following fields:

- Effective Date: 01/01/1900
- Status: Active
- Short Description: Grants
- Grants Management
- Invoice Number ID: NBR-PROJ
- Page Series ID: PC
- Attach Invoice Image Option: Not Defined at this level
- Contract Liability Options
- Revenue Recognition Basis: Invoice Date
- Dflt Contract Liab Dist Code
- From Email Address
- Exclude Credit Invoice Emails (checkbox)

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The bottom navigation bar shows 'Bill Type 1 | Bill Type 2 | Bill Type 3'.

- Enhanced 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 in Installation Options.

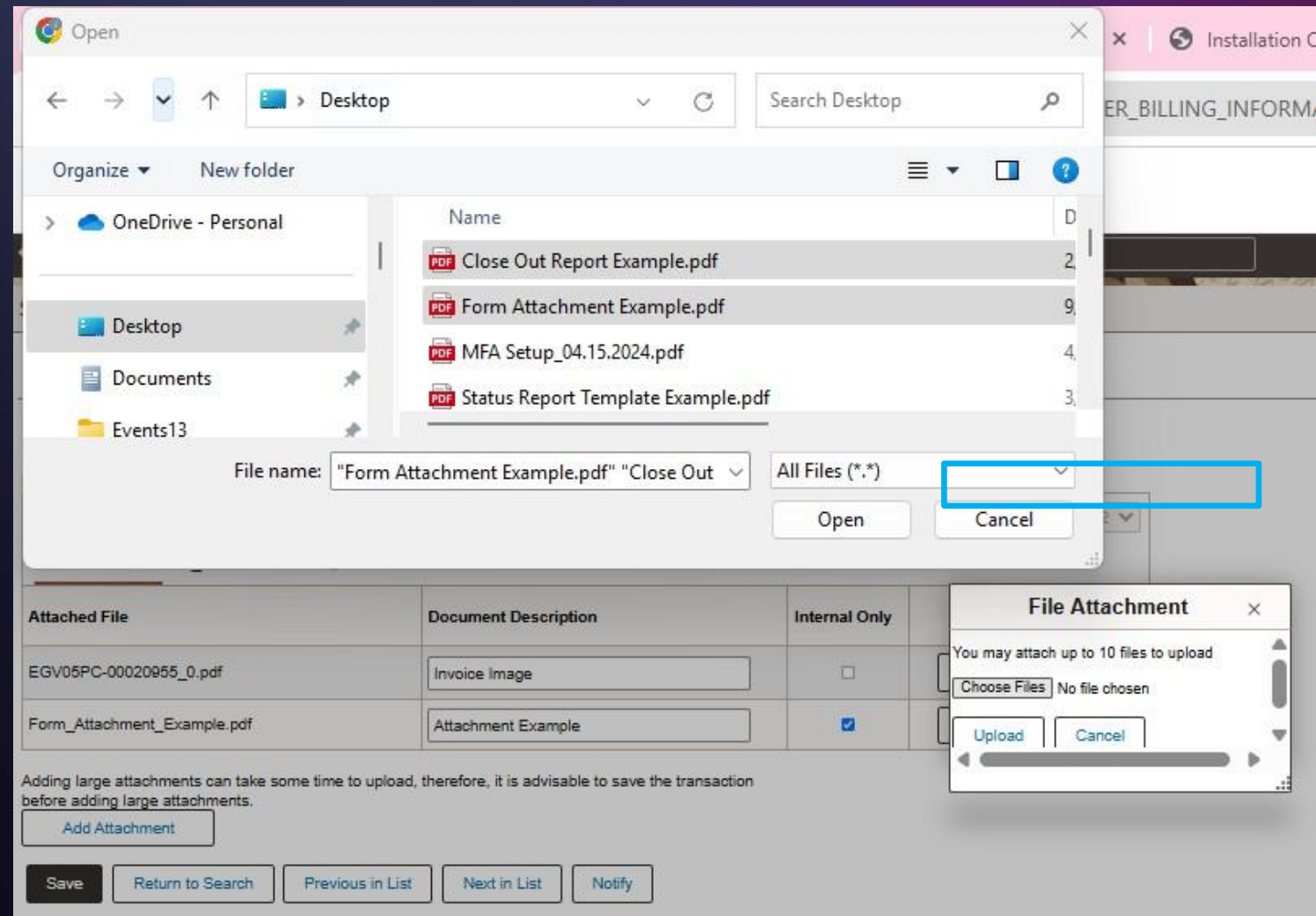
The screenshot displays the 'Supporting Documentation' interface. At the top, there are tabs for 'Header Documentation' and 'Line Documentation'. Below these, the 'Business Unit' is set to 'EGV05' and the 'Invoice' number is 'PC-00020855'. The 'Invoice Documents' section is active, showing a table with one row: 'EGV05PC-00020855_0.pdf' with a description of 'Invoice Image'. A modal window titled 'File Attachment' is open, displaying the message 'You may attach up to 10 files to upload' and a 'Choose Files' button. The modal also includes 'Upload' and 'Cancel' buttons. At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Attached File	Document Description	Internal Only	View
EGV05PC-00020855_0.pdf	Invoice Image	☐	View

Supporting Documents/Attachments

PUM 49

- Enhanced 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 in Installation Options.



- Enhanced invoicing to restrict users from deleting attachments from Supporting Documentations pages. You can configure your system so that specific roles can delete attachments. When using this feature, the user who attached the document can delete attachments regardless of their role.

Installation Options

- ☒ Enable Online Rendering
- ☒ Allow Changes to Credit Invoice Header
- ☐ Process Feature Security

Bill Finalization Process

- ☐ Enable Performance Loop

Identifier Look Up Options

- ☐ Use Invoice Date as Identifier Look Up Date
- ☐ Allow Override of Identifier Look Up Date

Use Effective Dated Identifier Description for Generating Recurring Bills and Copied Bills

- ☐ Use Effective Dated Identifier Description for Generating Recurring Bills and Copied Bills

Insights Reporting Preferences

Reporting Currency: USD

Rate Type: CRRNT

Authorize Delete Attachments

- ☐ Authorize Delete Attachments

Collector/Credit Analyst Default

- ☐ Use Bill Source, Bill Type or Billing Options

Search in Menu

View Supporting Documentation

Header Documentation

Line Documentation

Business Unit EGV05 Invoice PC-00020955

Invoice Documents

1-2 of 2

Documents

Additional Info

Document Description	Attached File	Internal Only	View
Invoice Image	EGV05PC-00020955_0.pdf	☐	View
Attachment Example	Form_Attachment_Example.pdf	☒	View

Return to Search

Previous in List

Next in List

Notify

Header Documentation | [Line Documentation](#)

Supporting Documents/Attachments

PUM 46

[←](#) | [🕒](#) [❤️](#)

View Supporting Documentation

[Header Documentation](#) [Line Documentation](#)

Business Unit EGV05 Invoice PC-00020955

Invoice Documents

1-2 of 2

[Documents](#) [Additional Info](#) [||>](#)

Document Description	Attached File	Internal Only	View
Invoice Image	EGV05PC-00020955_0.pdf	☐	View
Attachment Example	Form_Attachment_Example.pdf	☒	View

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

[Header Documentation](#) | [Line Documentation](#)

PUM 46

Supporting Documents/Attachments

← | ⌚ | ♥

Q Search in Menu

Installation Options

Installation Options

General Options

Product Options

Products

Overall

Alternate Character

Documentum

Entry Event

Commitment Control

Customer

Federal Processing

Multiple Attachments

Asset Management

Billing - General Options

Billing - Integration Options

Contracts

eBill - General

eBill - Electronic Payments

eSettlements

eSupplier Connection

Expenses

General Ledger

Grants

Grants Portal

Inventory

Inventory Counters

Maintenance Management

Manufacturing

Mobile Inventory

Mobile Inventory - Fluid

Order Management

Payables

Planning

Program Management

Project Costing

Project Costing Integration

Purchasing

Lease Administration

Receivables

Resource Management

Services Procurement

Staffing

Strategic Sourcing

Supplier Contract Management

Treasury

Save

Notify

Refresh

← | ⌚ | ♥

Q Search in Menu

Installation Options

Installation Options

Multiple Attachments

Default Attachment Limit: 10

Attachments Setup

⌕

Q

<<

<

1-10 of 13

>

>>

View All

	Product Code	Product Name	Attachment Limit
1	DBI	Billing	10
2	DCS	Supplier Contract Management	10
3	DIN	Inventory	10
4	DPO	Purchasing	10
5	FAP	Payables	10
6	FAR	Receivables	10
7	FEX	Expenses	10
8	FGL	General Ledger	10

Receivables



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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.

Request Receivables Update

Receivable Update Request Options

Run Control ID AR_UPDATE_ALL Report Manager Process Monitor Run

☐ Post All Business Units

Process Request Parameters

*Group Unit EGV05

Process Frequency Always

*High Balance Basis Date Run Date

*Accounting Date From 01/01/1900

*Accounting Date To 02/28/2025

Transaction Types

- ☒ ALL
- ☒ Direct Debits
- ☒ Overdue Charges
- ☒ Pending Items
- ☒ Drafts
- ☒ Payments
- ☒ Transfers
- ☒ Maintenance Transactions
- ☒ Unpost Transactions

Customer History Options

- ☐ User Defined
- ☐ Payment Performance
- ☐ DSO
- ☐ SubCustomer

Last Run On

Last Run On Process Instance

Save Return to Search Notify Add Update/Display

Receivable Update Request 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.

The screenshot shows the 'Request Receivables Update' window in Oracle. The 'Receivable Update Request' tab is active, showing 'Run Control ID' as 'AR_UPDATE_ALL'. The 'Post All Business Units' checkbox is checked. Under 'Process Request Parameters', '*Group Unit' is 'EGV05', 'Process Frequency' is 'Always', '*High Balance Basis Date' is 'Run Date', '*Accounting Date From' is '01/01/1900', and '*Accounting Date To' is '02/28/2025'. The 'Transaction Types' section has checkboxes for ALL, Direct Debits, Overdue Charges, Pending Items, Drafts, Payments, and Transfers, all of which are checked. The 'Customer History Options' section has checkboxes for User Defined, Payment Performance, DSO, and SubCustomer, all of which are unchecked. A confirmation dialog is displayed in the foreground with the following text: 'Post all business units was selected. Existing process request parameters will be deleted. (6840,1041) All business units will be posted with default run control values. Existing values defined for business units will be deleted. Select Yes to proceed with the delete. Select No to cancel the delete.' The dialog has 'Yes' and 'No' buttons. The background interface includes buttons for 'Run', 'Report Manager', 'Process Monitor', 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

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.

Request Receivables Update

Receivable Update Request Options

Run Control ID AR_UPDATE_ALL Report Manager Process Monitor Run

☒ Post All Business Units Job Message Log Summary

Process Request Parameters 1 of 11 View All

*Group Unit EGV05 + -

Process Frequency Always *High Balance Basis Date Run Date

*Accounting Date From 01/01/1900 *Accounting Date To 02/26/2025

Transaction Types

☒ ALL ☒ Pending Items ☒ Payments ☒ Maintenance Transactions
☒ Direct Debits ☒ Drafts ☒ Transfers ☒ Unpost Transactions
☒ Overdue Charges

Customer History Options

☐ User Defined
☐ Payment Performance
☐ DSO
☐ SubCustomer

Last Run On

Last Run On
Process Instance

Save Return to Search Notify Add Update/Display

Receivable Update Request Options

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

The screenshot displays the PeopleSoft Collections Workbench interface. The main window shows customer details for 'National Cancer Institute' with a balance of 5,617.07. A modal dialog titled 'Item Maintenance' is open, allowing for direct attachment to an item. The dialog is divided into several sections: 'Discount Options' (Due Date: 02/19/2025, Terms: IMMED, Discount Amount: 0.00), 'Payment/Draft Options' (Payment Method: Check, Draft Type: , Direct Debit Profile ID:), 'Customer Relations' (Dispute, Deduction, Doubtful, Collection checkboxes with associated fields), 'Other Options' (Revaluation Flag, Available for Netting), and 'Item Creation/Update Details' (Created On: 02/19/2025 6:42PM, Modified On: 02/19/2025 6:45PM). The background shows a table with one item selected (PC-00020955) and search result totals.

Seq Nbr	Select	Item	Customer Name	SubCust
1	☐	PC-00020955	National Cancer Institute	

Search Result Totals	
Debits	1
Credits	
Total	1
Selected	

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

The screenshot displays the PeopleSoft Collections Workbench interface. A 'Billing Invoice Attachments' dialog box is open, showing a table of attachments for item PC-00020955. The background interface includes sections for Customer Details, Item List, and Search Result Totals.

Billing Invoice Attachments Dialog:

View	Document Description	Attached File
View	Invoice Image	EGV05PC-00020955_0.pdf
View	Attachment Example	Form_Attachment_Example.pdf
View	Attachment Example	Status_Report_Template_Example.pdf

Background Interface Details:

- Customer Details:** Bill To Address 1: 6701 Rockledge Drive, Bill To City: Bethesda, Bill To State: MD, Last Payment Date, Last Payment Amount 0.00, Balance 5,617.07, Past Due 5,617.07, Credit Limit 0.00, Risk Score, Broken Promises 0.
- Item List:** Table with columns: Seq Nbr, Select, Item, Customer Name, SubCust. Row 1: 1, ☐, PC-00020955, National Cancer Institute.
- Search Result Totals:** Debits 1, Credits 1, Total 1, Debit Amount, Credit Amount, Total Amount.

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

The screenshot displays the 'Item Maintenance' window in PeopleSoft. The window is divided into several sections: 'Customer Details', 'Discount Options', 'Customer Relations', 'Payment/Draft Options', 'Other Options', and 'Item Creation/Update Details'. The 'Item Attachments(0)' button is highlighted with a red rectangle at the bottom of the window. The 'Item List' table shows one item with sequence number 1 and item ID PC-00020955. The 'Search Result Totals' section shows 1 debit and 1 credit. The 'Item Creation/Update Details' section shows the item was created on 02/19/2025 by JMANNN.

Seq Nbr	Select	Item	Customer Name
1	☐	PC-00020955	National Cancer Institute

Debits	Credits	Total
1	1	1

Item Creation/Update Details

Field	Value
Created On	02/19/2025 6:42PM
Created By	JMANNN
Last Modified On	02/19/2025 6:45PM
Modified By	JMANNN

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

The screenshot displays the PeopleSoft Collections Workbench interface. The 'Item Maintenance' window is open, showing details for a customer (National Cancer Institute) and an item (PC-00020955). The 'Item Attachments' dialog box is overlaid, allowing users to add attachments directly to the item. The dialog includes a table for listing attachments with columns for File Name, Description, User ID, Name, and Date/Time Stamp. A red box highlights the 'Add Attachment' button. The background shows the 'Collections Workbench' with various tabs and a search bar.

Item Maintenance

Unit: EGV05 Customer: 0000050046 National Cancer Institute

Item ID: PC-00020955 Line: Days Late: 19 Status: Open

Accounting Date: 02/19/2025 Balance: 5,617.07 USD Billing Unit: EGV05 Detail

Entry Type: IN Original Amount: 5,617.07 USD

Entry Reason: AR Dist Info: AR Payment Plan

Item Attachments

Business Unit: EGV05 Customer ID: 0000050046 Item ID: PC-00020955 Item Line

Details

File Name	Description	User ID	Name	Date/Time Stamp
View				

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding attachments.

Add Attachment

OK Cancel Refresh

Item Creation/Update Details

Created On: 02/19/2025 6:42PM Last Modified On: 02/19/2025 6:45PM

Created By: JMANN Modified By: JMANN

Split: Item Action Add Conversation Item Attachments(0) Invoice Attach(3) View Audit Logs

OK Cancel Apply Refresh

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

The screenshot displays the 'Item Maintenance' window in PeopleSoft. The 'Item Attachments' dialog box is open, showing a table with the following data:

File Name	Description	User ID	Name	Date/Time Stamp
Form_Attachment_Example.pdf	Item Attachment Example	JMANN	Kenneth Schumacher	03/19/2025 2:46:55PM

The dialog box also includes fields for Business Unit (EGV05), Customer ID (0000050046), Item ID (PC-00020955), and Item Line. Below the table, there is an 'Add Attachment' button and a 'Refresh' button. The background window shows the 'Item Maintenance' details for the selected item, including accounting date, entry type, and balance.

Add Attachment Directly to an Item

PUM 46

- Enhanced PeopleSoft Receivables to add attachments directly to items.

Collections Workbench

Customer Details

Bill To Address 1 6701 Rockledge Drive
Bill To City Bethesda
Bill To State MD
Last Payment Date
Last Payment Amount 0.00

Item Maintenance

Unit: EGV05 Customer: 0000050646 National Cancer Institute
Item ID: PC-00020955 Line: Days Late: 19 Status: Open

Accounting Date: 02/19/2025 Balance: 5,617.07 USD Billing Unit: EGV05 Detail
Entry Type: IN Original Amount: 5,617.07 USD
Entry Reason: AR Dist Info: AR Payment Plan

Discount Options

Due Date: 02/19/2025 Due Days:
Terms: IMMED Discount Days:
Discount Amount: 0.00 Date:
Discount Amount 1: Date 1:
☐ Always Allow Discount
As Of Date: 02/19/2025 Posted: 02/19/2025

Customer Relations

☐ Dispute Reason: Date:
Dispute Amount:
☐ Deduction Reason: Date:
☐ Doubtful Code: Date:
Analyst: JKB John Barkowitz
Collector: MOM Marcia Masterson
Sales Person: 002 Angelini, Gina
AR Specialist:

Payment/Draft Options

Payment Method: Check Pay By Credit Card
Draft Type:
Direct Debit Profile ID:
☐ Preapproved?
☐ Create Document?
☐ One item per Draft?

Other Options

☒ Revaluation Flag ☒ Available for Netting

Item Creation/Update Details

Created On: 02/19/2025 6:42PM Last Modified On: 03/10/2025 2:47PM
Created By: JMANN Modified By: JMANN

Item Attachments(1)

Split Item Action Add Conversation

OK Cancel Apply

Refresh

Direct Journal Enhancements

PUM 48

- 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.

← | ⌚ | ♥ Search in Menu

Copy Direct Journal

Deposit Unit EGV05 Deposit ID 11

Direct Journal Action

☐ No Action
☒ Copy Direct Journal

Number of Copies [Create Direct Journals](#)

Copy Results

Sequence	Copy Deposit ID
1	NEXT

[Save](#) [Return to Search](#) [Notify](#)

Direct Journal Enhancements

PUM 48

- 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.

← | ⌚ | ♥ Search in Menu

Copy Direct Journal

Deposit Unit EGV05 Deposit ID 11

Direct Journal Action

☒ No Action
☐ Copy Direct Journal

Number of Copies 1 Create Direct Journals

Copy Results

Sequence	Copy Deposit ID	Go to Direct Journal Acctg Entries
1	12	Go to Direct Journal Acctg Entries

Save Return to Search Notify

Direct Journal Enhancements

PUM 48

- 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.

The screenshot displays the 'Direct Journal Acctg Entries' interface. At the top, there's a search bar labeled 'Search in Menu'. Below it, the title 'Direct Journal Acctg Entries' is followed by two tabs: 'Accounting Entries' (selected) and 'Deposit Control'. The main area shows fields for 'Unit' (EGV05), 'Deposit ID' (12), 'Payment' (320840298), and 'Seq' (1). A 'Currency Details' section shows 'Amount' as '1,000.00 USD'. Below this, there's a 'Complete' checkbox (highlighted with a red box) and an 'Entry Event' search field. A 'Budget Status' section is also visible. The 'Distribution Lines' section features a table with columns: Distribution Sequence, GL Unit, Speed Type, Line Amount, Currency, Account, Alt Acct, Oper Unit, Fund, Dept, Program, and C. The table contains two rows of data. Navigation controls like '< >' and '1-2 of 4' are present at the bottom of the table.

Distribution Sequence	GL Unit	Speed Type	Line Amount	Currency	Account	Alt Acct	Oper Unit	Fund	Dept	Program	C
1	1 EGV05	Speed Type	-1,000.00	USD	5006				41000		
2	2 US003	Speed Type	1,000.00	USD	100003						

Direct Journal Enhancements

PUM 48

- 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.

← | ⌚ | ♥

Q Search in Menu

Payment Status

Entered Date =

Payment Type =

Payment Predictor ☐

^ Show fewer options

☐ Case Sensitive

Search Clear Save Search

Search Results

4 results - Deposit Unit "EGV05" Payment ID "320840298" +1 more

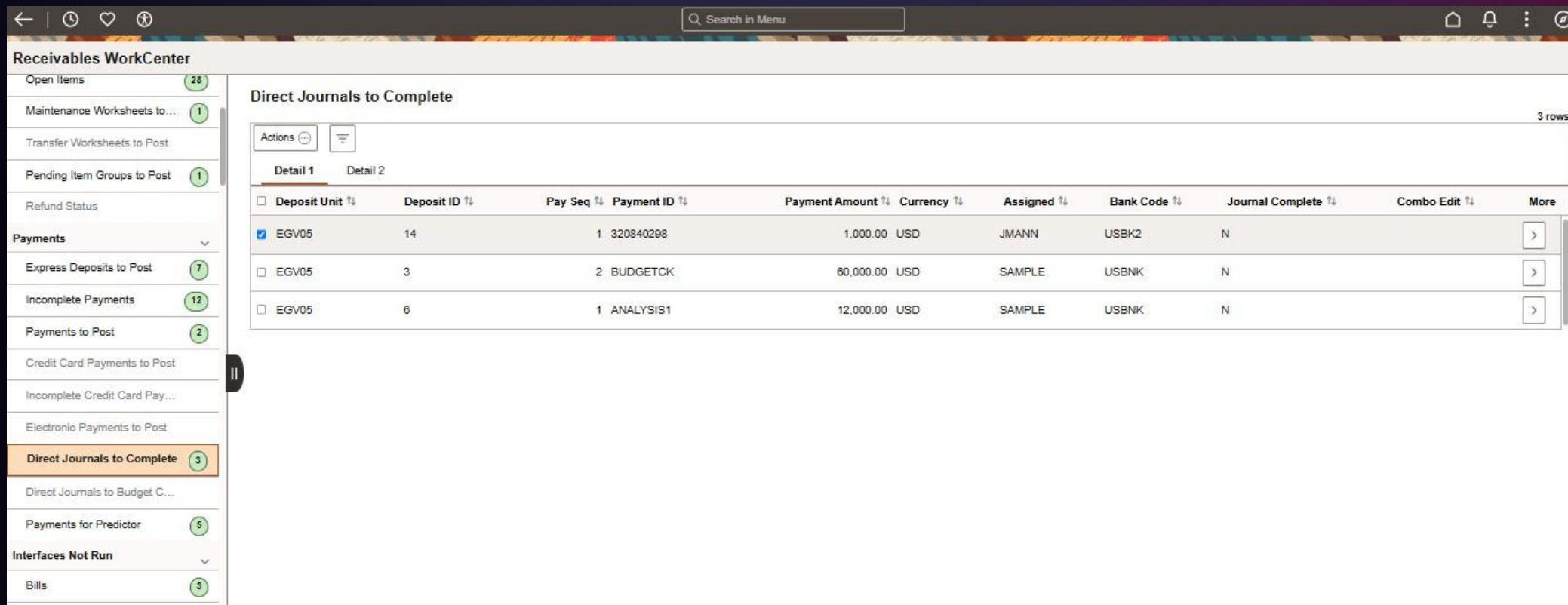
1-4 of 4 View All

Deposit Unit	Deposit ID	Payment Sequence	Payment ID	User ID	Assigned Operator ID	Payment Status	Accounting Date	Entered Date	Payment Type	Payment Predictor	
EGV05	11	1	320840298	JMANN	JMANN	Journalled	02/01/2025	03/10/2025	Payment	N	>
EGV05	12	1	320840298	JMANN	JMANN	Journalled	03/10/2025	03/10/2025	Payment	N	>
EGV05	13	1	320840298	JMANN	JMANN	Unident	03/10/2025	03/10/2025	Payment	N	>
EGV05	14	1	320840298	JMANN	JMANN	Unident	03/10/2025	03/10/2025	Payment	N	>

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.



Receivables WorkCenter

Open Items 28

Maintenance Worksheets to... 1

Transfer Worksheets to Post

Pending Item Groups to Post 1

Refund Status

Payments

Express Deposits to Post 7

Incomplete Payments 12

Payments to Post 2

Credit Card Payments to Post

Incomplete Credit Card Pay...

Electronic Payments to Post

Direct Journals to Complete 3

Direct Journals to Budget C...

Payments for Predictor 5

Interfaces Not Run

Bills 3

Direct Journals to Complete 3 rows

Detail 1	Detail 2
☐ Deposit Unit %	☐ Deposit ID %
☒ EGV05	14
☐ EGV05	3
☐ EGV05	6

Pay Seq %	Payment ID %	Payment Amount %	Currency %	Assigned %	Bank Code %	Journal Complete %	Combo Edit %	More
1	320840298	1,000.00	USD	JMANN	USBK2	N		>
2	BUDGETCK	60,000.00	USD	SAMPLE	USBK2	N		>
1	ANALYSIS1	12,000.00	USD	SAMPLE	USBK2	N		>

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.

Receivables WorkCenter

Open Items (28)

Maintenance Worksheets to Post (1)

Transfer Worksheets to Post

Pending Item Groups to Post (1)

Refund Status

Payments

Express Deposits to Post (7)

Incomplete Payments (12)

Payments to Post (2)

Credit Card Payments to Post

Incomplete Credit Card Payments to Post

Electronic Payments to Post

Direct Journals to Complete (3)

Direct Journals to Budget Check

Payments for Predictor (5)

Interfaces Not Run

Bills (3)

Cash Drawer Receipts

Direct Journals

3 rows

Detail 1	Detail 2									
☐ Deposit Unit	Deposit ID	Pay Seq	Payment ID	Payment Amount	Currency	Assigned	Bank Code	Journal Complete	Combo Edit	More
☒ EGV05	14	1	320840298	1,000.00	USD	JMANN	USBK2	N		>
☐ EGV05	3	2	BUDGETCK	60,000.00	USD	SAMPLE	USBK	N		>
☐ EGV05	6	1	ANALYSIS1	12,000.00	USD	SAMPLE	USBK	N		>

- 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.

The screenshot shows the Oracle Receivables WorkCenter interface. On the left is a navigation menu with items like 'Open Items', 'Maintenance Worksheets to...', 'Transfer Worksheets to Post', 'Pending Item Groups to Post', 'Refund Status', 'Payments', 'Express Deposits to Post', 'Incomplete Payments', 'Payments to Post', 'Credit Card Payments to Post', 'Incomplete Credit Card Pay...', 'Electronic Payments to Post', 'Direct Journals to Complete' (highlighted), 'Direct Journals to Budget C...', and 'Payments for Predictor'. The main area is titled 'Direct Journals to Complete' and shows a table with 3 rows. A modal dialog is open in the center, asking 'Mark the select direct journal(s) as complete?' and providing a warning: 'This is a warning message to make sure that you want to mark the selected direct journal(s) as complete. Press Yes to proceed the action. Press No to cancel the action.' The dialog has 'Yes' and 'No' buttons.

Deposit Unit %	Deposit ID %	Pay Seq %	Payment ID %	Payment Amount %	Currency %	Assigned %	Bank Code %	Journal Complete %	Combo Edit %	More
☒ EGV05	14	1	320840298	1,000.00	USD	JMANN	USBK2	N		>
☐ EGV05	3	2	BUDGETCK	60,000.00	USD	SAMPLE	USBK2	N		>
☐ EGV05										>

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.

The screenshot displays the Oracle Receivables WorkCenter interface. On the left is a navigation menu with categories like 'Refund Status', 'Payments', and 'Interfaces Not Run'. The 'Payments' section is expanded, showing options such as 'Express Deposits to Post', 'Incomplete Payments', 'Payments to Post', 'Credit Card Payments to Post', 'Incomplete Credit Card Pay...', 'Electronic Payments to Post', 'Direct Journals to Complete', 'Direct Journals to Budget ...', 'Payments for Predictor', 'Bills', 'Cash Drawer Receipts', and 'Excel Payment Upload'. The 'Direct Journals to Budget ...' option is selected and highlighted in orange. The main content area is titled 'Direct Journals to Budget Check' and shows a table with one row of data. The table has columns for Deposit Unit, Deposit ID, Pay Seq, Payment ID, Payment Amount, Currency, Assigned, Budget Status, Bank Code, and More. The data row shows 'EGV05' as the Deposit Unit, '14' as the Deposit ID, '1' as the Pay Seq, '320840298' as the Payment ID, '1,000.00' as the Payment Amount, 'USD' as the Currency, 'JMANN' as the Assigned value, 'Not Budget Checked' as the Budget Status, and 'USBK2' as the Bank Code. There are also 'Actions' and 'Detail' tabs at the top of the table.

Deposit Unit	Deposit ID	Pay Seq	Payment ID	Payment Amount	Currency	Assigned	Budget Status	Bank Code	More
EGV05	14	1	320840298	1,000.00	USD	JMANN	Not Budget Checked	USBK2	>

Commitment Control



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*Expertise in
Oracle Cloud Platform
in North America*

*Expertise in
Oracle EPM Cloud
in North America*

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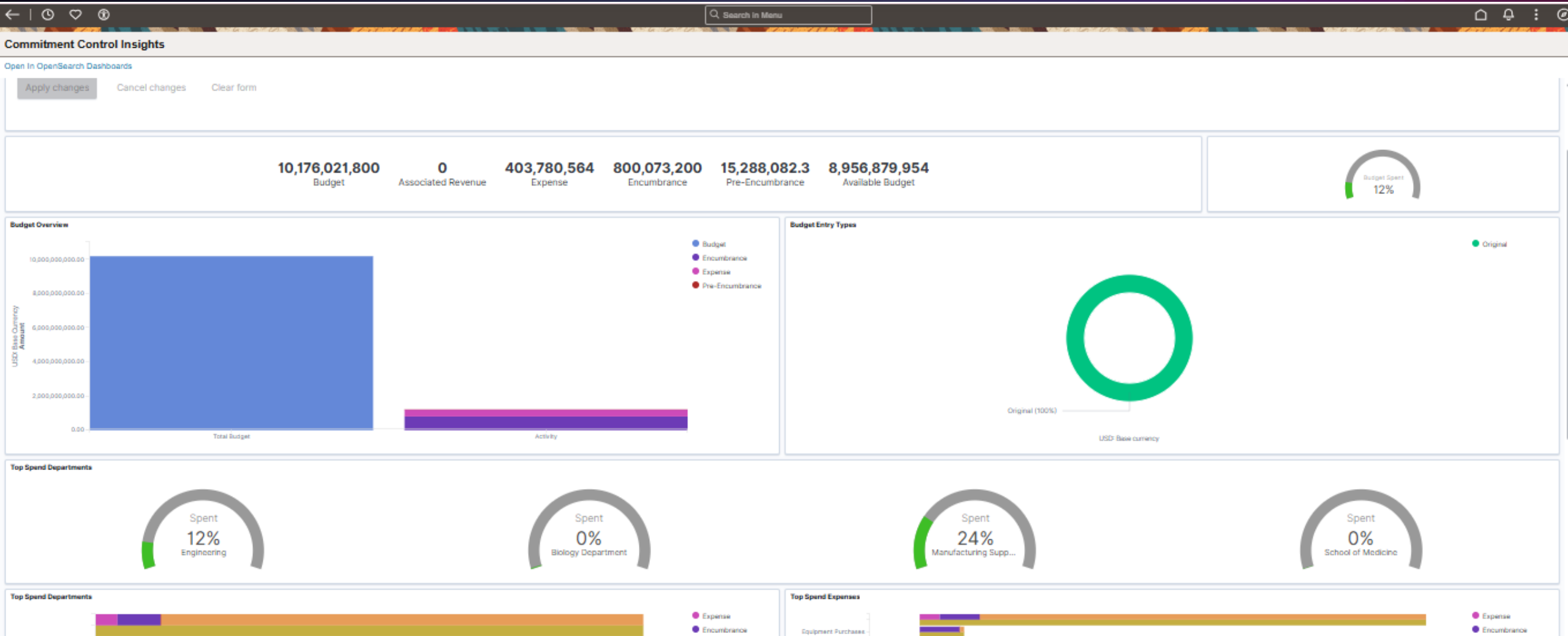
Gartner.
Recognized Vendor



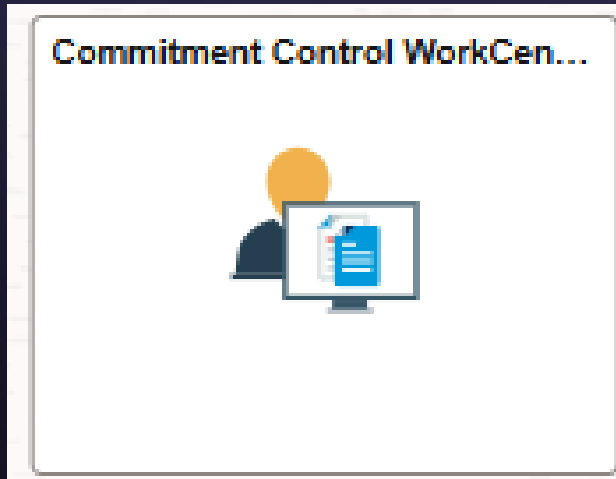
- Enhanced Commitment Control analytics using PeopleSoft Insights dashboard. The Commitment Control Insights dashboard provides a summarized view of ledger balances with the ability to drill down to detail budget and source transaction lines for an expense ledger group. This search Index requires PeopleTools 8.59.14 for best results.



- Enhanced Commitment Control analytics using PeopleSoft Insights dashboard. The Commitment Control Exceptions Insights dashboard provides a summary of commitment control exceptions based on the Budget Checking (FS_BP) process.



- Added the Commitment Control WorkCenter in Fluid. This WorkCenter includes these pagelets: My Work, My Approvals, Links, Queries, and Reports and Processes.



Commitment Control WorkCenter

PUM 51

- Enhanced the Commitment Control WorkCenter in Fluid by adding the Insights grouplet. The Insights grouplet includes the Commitment Control Insights and Commitment Control Exceptions dashboards.

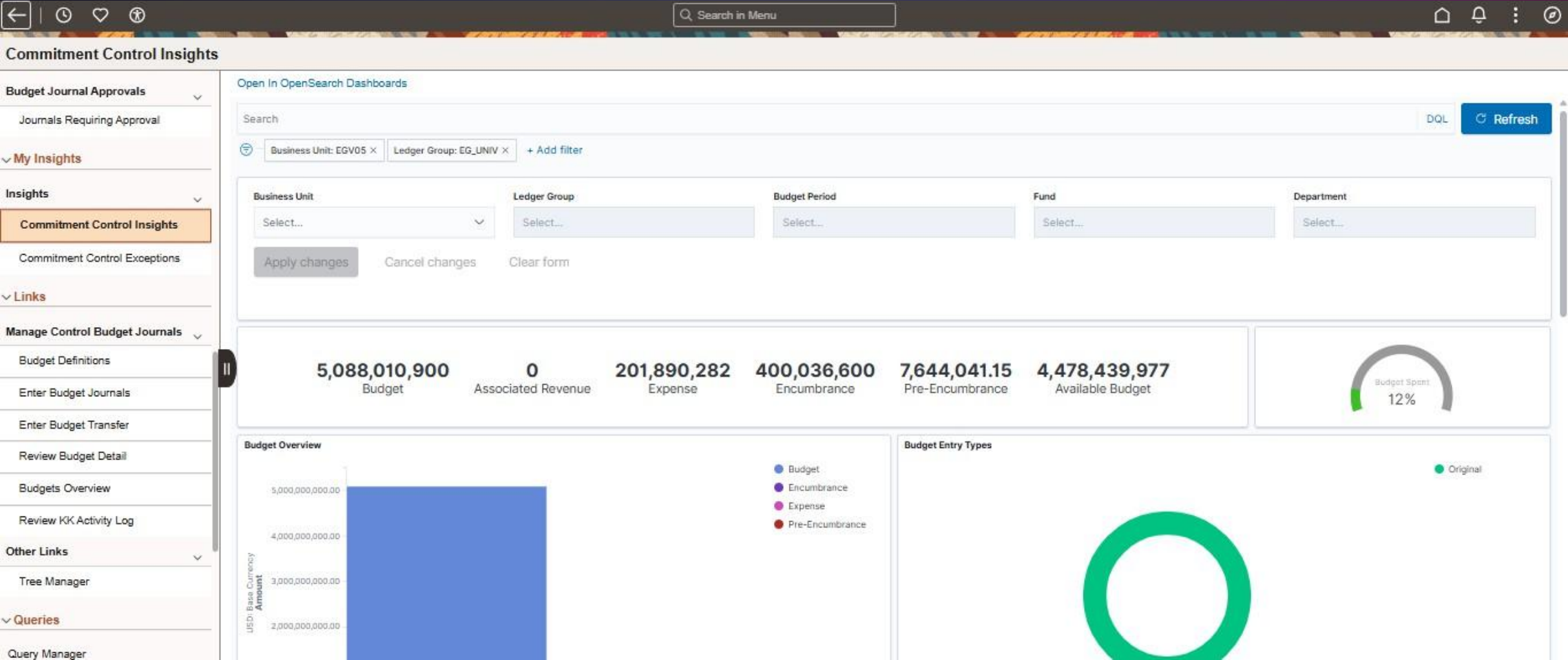
The screenshot displays the Oracle Commitment Control WorkCenter interface. On the left is a navigation menu with sections like 'My Work', 'Manage Budget Journals', 'Source Transaction Errors', and 'Purchase Orders'. The main area shows the 'Budget Exceptions' dashboard with a table of exceptions. The table has columns for Actions, Business Unit, Ledger Group, Document Name, Value, Exception, Amount, Currency, Overridden, and ChartFields. Two rows of data are visible, both for Business Unit EGV05 and Ledger Group EG_UNIV, with exceptions 'No Budget Exists'.

Actions	Business Unit	Ledger Group	Document Name	Value	Exception	Amount	Currency	Overridden	ChartFields
⋮	EGV05	EG_UNIV	Purchase Order:	PC00000003	No Budget Exists	371.11	USD		ChartFields
⋮	EGV05	EG_UNIV	Purchase Order:	PC00000002	No Budget Exists	100.00	USD		ChartFields

- Enhanced the Commitment Control WorkCenter in Fluid by adding the Insights grouplet. The Insights grouplet includes the Commitment Control Insights and Commitment Control Exceptions dashboards.

The screenshot displays the Oracle Commitment Control WorkCenter interface. The left sidebar contains a navigation menu with sections: Budget Journal Approvals, My Insights (selected), Insights, Links, and Manage Control Budget Journals. The main content area is titled 'Budget Exceptions' and shows a table with 2 rows of data. The table columns are: Actions, Business Unit, Ledger Group, Document Name, Value, Exception, Amount, Currency, Overridden, and ChartFields. The data rows show two exceptions for Business Unit EGV05 and Ledger Group EG_UNIV, both with the exception 'No Budget Exists'.

Actions	Business Unit	Ledger Group	Document Name	Value	Exception	Amount	Currency	Overridden	ChartFields
ⓘ	EGV05	EG_UNIV	Purchase Order:	PC00000003	No Budget Exists	371.11	USD		ChartFields
ⓘ	EGV05	EG_UNIV	Purchase Order:	PC00000002	No Budget Exists	100.00	USD		ChartFields



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- 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.

- Current functionality allows a complete wildcard for a field as criteria meaning all values for the field are priced for billing and revenue. We plan to enhance the Rate Set and Pricing Process to allow for partial wildcards as criteria for a field. As an example, with this enhancement, the rate set could include as criteria source types starting with a 2 (2%) or accounts starting with 600 (600%). This would normally require each value to be selected as a separate entry in the criteria grid. With this enhancement, customers can create rate set configurations much more quickly with reduced errors and maintenance.

- Customers would like the ability to identify specify transactions to exclude from billing and revenue recognition. Current Rate Set functionality identifies transactions to include. This can be an issue if there are exceptions for a particular transaction type. As an example, if source type is used as criteria and all but a few source types should be priced, then the rate set must list all of the included values. If there are a lot of source type values, then the user has to enter a row for each included value. With this enhancement, we plan to enhance the rate set configuration such that Customers can specify excluded transaction criteria. In cases where most values are priced, the rate set can be simplified to show only the exclusions. This will simplify the rate set configuration for Customers who bill and recognize revenue on most costs with only a few exceptions.

Ideas Lab

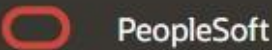


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- PeopleSoft Innovators Program
 - Feature Innovators
 - Expansion Innovators
 - PeopleSoft Innovators

- Get Involved
 - Collaborate and Connect
 - PeopleSoft Focus Groups
 - PeopleSoft CABs
 - Ideas Lab
 - Quest Oracle Community

Oracle Communities

Categories

New Idea

Quick Links

Categories

Recent Discussions

Activity

My Bookmarks 2

Best Of...

Unanswered Groups 100+

Help

Popular Tags

EBS-FIN-Payables 19,740

legacy_documents 10,761

EBS-ATG-Patch 8,048

Webcasts 7,301

payroll 5,052

EBS_PROC_Purchasing 5,009

EBS-HCM-HCM 4,863

EBS_AP_Invoices 3,864

purchasing 3,615

EBS-ATG-TechStack 3,392

eBlog 3,026

webcast 2,908

EBS_AP_Payments 2,737

EBS_FA_Assets 2,730

moscmove 2,684

Absences, Time & Labor 2,500

EBS_PROC_Procurement 2,476

EBS-ATG-Upgrade 2,460

EBS-FIN-CashMgmt 2,181

upgrade 2,178

EBS-ATG-Install 1,769

EBS_AR_Receivables 1,750

EBS_OM_OrderToCash 1,562

EBS-ATG-Forms 1,560

P6 Enterprise Project Portfolio 1,557

Welcome to the newly structured PeopleSoft Ideas Lab. The number of communities has been expanded to more precisely classify the types of Ideas. The naming convention has also changed to help categorize the Idea topics and thus combine "like" areas together in the community listing: FSCM (for Financial), HCM (for Human Capital Management), and Tech (for Technical).

PeopleSoft - Ideas Lab

Categories	Discussions	Comments	Latest Post
CS - Campus Solutions - PSFT Ideas	425	718	Add Representati... Attain Solutions 11:25AM
FSCM - Asset and Maintenance Management - PSFT Ideas	206	475	On Behalf of Cus... George M-Oracle Feb 20, 2025 7:19AM
FSCM - Billing, Receivables, and eBill Payment - PSFT Ideas	257	235	Bill By Identifier ... David H-OC Feb 20, 2025 9:54AM
FSCM - Cash Management and Treasury - PSFT Ideas	109	124	ISO20022 XML B... Andrei Broscaru Feb 19, 2025 2:46AM
FSCM - Contracts - PSFT Ideas	57	65	Customer Contra... Joe Willever-Peo... Feb 24, 2025 8:02AM
FSCM - eProcurement - PSFT Ideas	266	642	Fluid ePro Requi... Lisa Romero Feb 21, 2025 11:44AM
FSCM - Expenses - PSFT Ideas	339	643	Ability for an ad... dgreene Feb 20, 2025 11:24AM
FSCM - General Ledger - PSFT Ideas	311	341	On Behalf of Cus... User_0QPKA Feb 20, 2025 9:06PM
FSCM - Grants - PSFT Ideas	70	116	Exception for Pro... Samantha Fildish Feb 21, 2025 10:36AM
FSCM - Inventory and Order Management - PSFT Ideas	145	159	Create a way to L... Sudeshan Telp... Feb 19, 2025 4:10PM

Oracle Communities

Discussions

How to Receive MOSC Notifications

Want to receive email notifications for new posts in your areas of interest? Read this article to learn more.

- Setting Up Category Notifications for New Content

[Ask a Question](#)

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- Recent Discussions
- Activity
- My Bookmarks 4
- Best Of...
- Unanswered 100+
- Groups
- Help

My Bookmarks

9

Project ID and Activity ID Numbering

Active 27 views 3 comments 3 new

Most recent by user3241694 Mar 5, 2025 2:43PM

FSCM - Projects and Resources - PSFT Ideas

2

PeopleSoft Grants - Budget posted to incorrect period

Active 16 views 2 comments

Most recent by user10549242 Feb 20, 2025 8:57AM

FSCM - Grants - PSFT Ideas

3

Standard Activities Across Project Types

Active 2 views 1 comment

Most recent by Natalie Webb Jul 1, 2024 1:42PM

FSCM - Projects and Resources - PSFT Ideas

3

Allow deletion of attachments on the Discussion Service Page

Active 3 views 0 comments

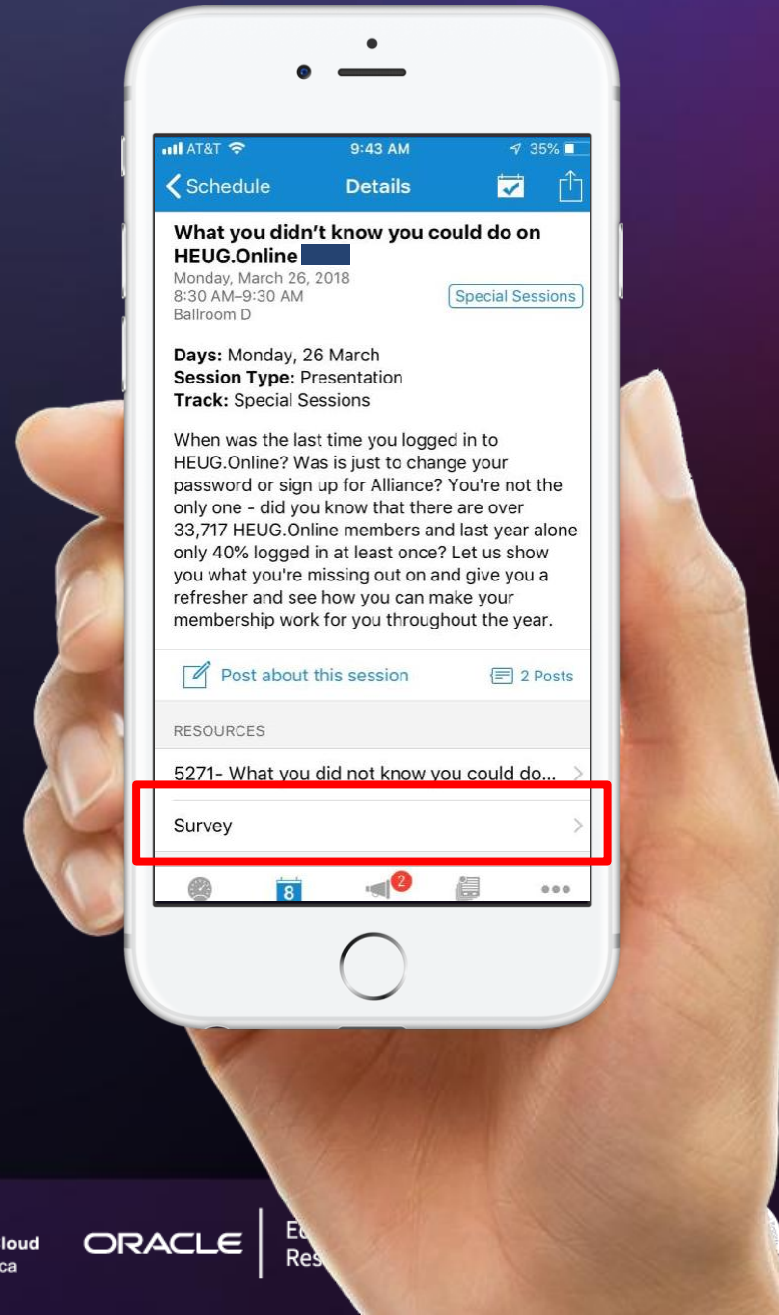
Most recent by User_VYHD6 Aug 8, 2023 1:56PM

FSCM - General Ledger - PSFT Ideas

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!

2025 Training Calendar

Upcoming Class Schedule

Date	Session
March 12	PeopleSoft 9.2 Query Basic & Intermediate for HCM
March 13	PeopleSoft 9.2 Query Advanced for HCM
March 17 - 20	PeopleTools System Administration
April 8	PeopleSoft 9.2 Query Basic & Intermediate for FSCM
April 9	PeopleSoft 9.2 Query Advanced for FSCM
April 15	PeopleSoft 9.2 Campus Solutions: Student Records & Registration
April 16	PeopleSoft 9.2 Campus Solutions: Academic Advisement
April 16	PeopleTools Security (Functional) for FSCM & HCM
April 17 - 18	PeopleTools Security (Technical) for FSCM

Visit our [website](#) for more information

2025 Training Calendar

Upcoming Class Schedule

Date	Session
April 22	HCM Bootcamp – Core HR
April 23	HCM Bootcamp - NA Payroll
April 24	HCM Bootcamp – Benefits Administration
April 23 - 24	Using PeopleSoft with Cloud Manager on OCI
April 29	PeopleSoft 9.2 Campus Solutions: Admissions Applications
April 30	PeopleSoft 9.2 Campus Solutions: 3Cs
April 29 - 30	PeopleSoft Insights with OpenSearch Technologies
May 6	PeopleSoft 9.2 Query Basic & Intermediate for HCM
May 7	PeopleSoft 9.2 Query Advanced for HCM
June 3	Automated Testing with PeopleSoft Test Framework

Visit our [website](#) for more information