SpearMC

PeopleSoft Grants Labor Cost Distribution and Effort Reporting Solution

May 13, 2022

ORACLE Partner | Expertise in PeopleSoft in North America | Expertise in Oracle Cloud Platform in North America | Expertise in Oracle EPM Cloud in North America | ORACLE Education Reseller | Gartner Recognized Vendor

Meet SpearMC

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Meet SpearMC

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Gartner recognized. Oracle specialized.

SpearMC is the sole featured PeopleSoft vendor in the latest 2022 Gartner Market Guide for Oracle Professional Services. We invested heavily into PeopleSoft several years ago and went “all in” with our leading approach to Oracle Cloud Infrastructure.

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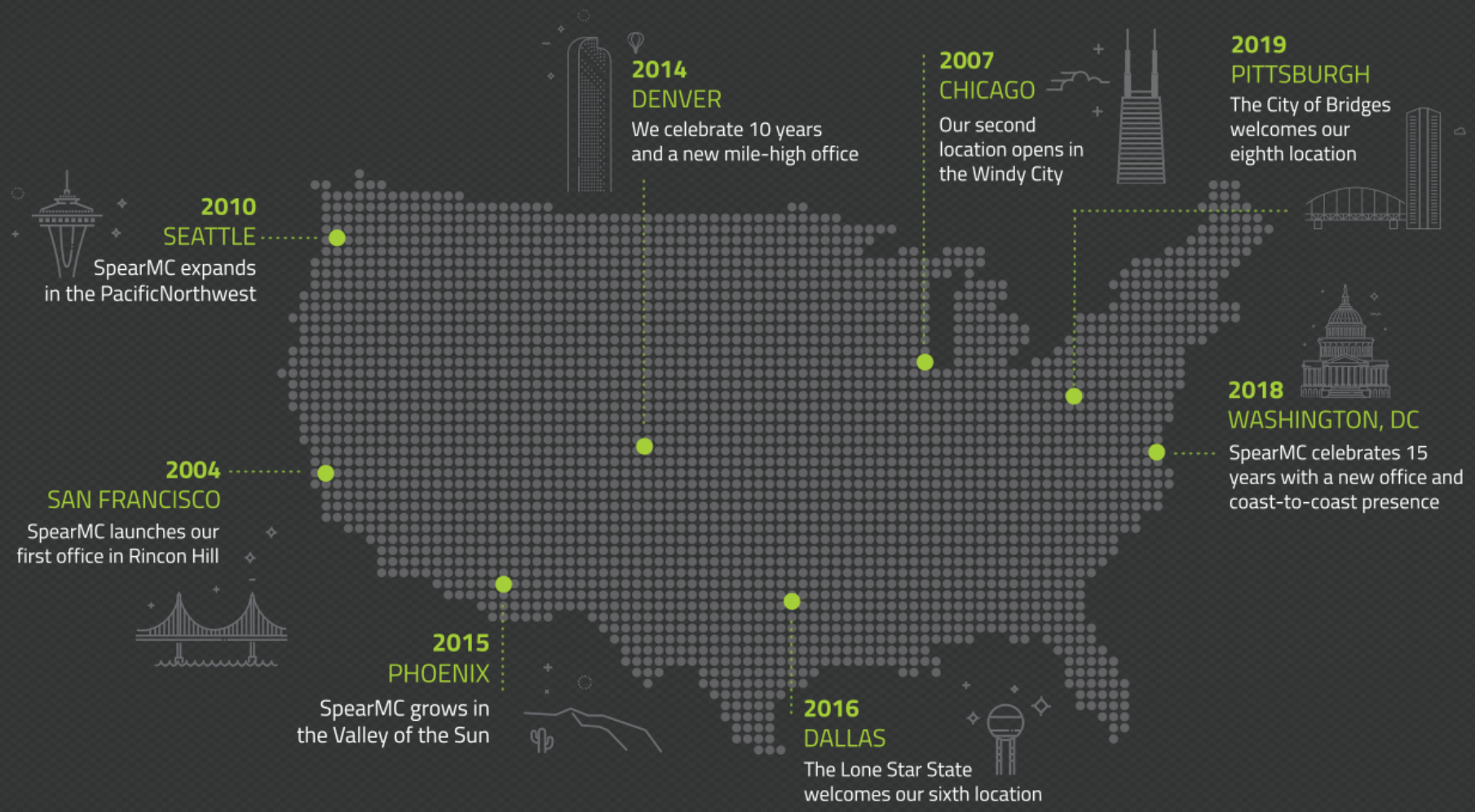
Coast-to-coast Coverage



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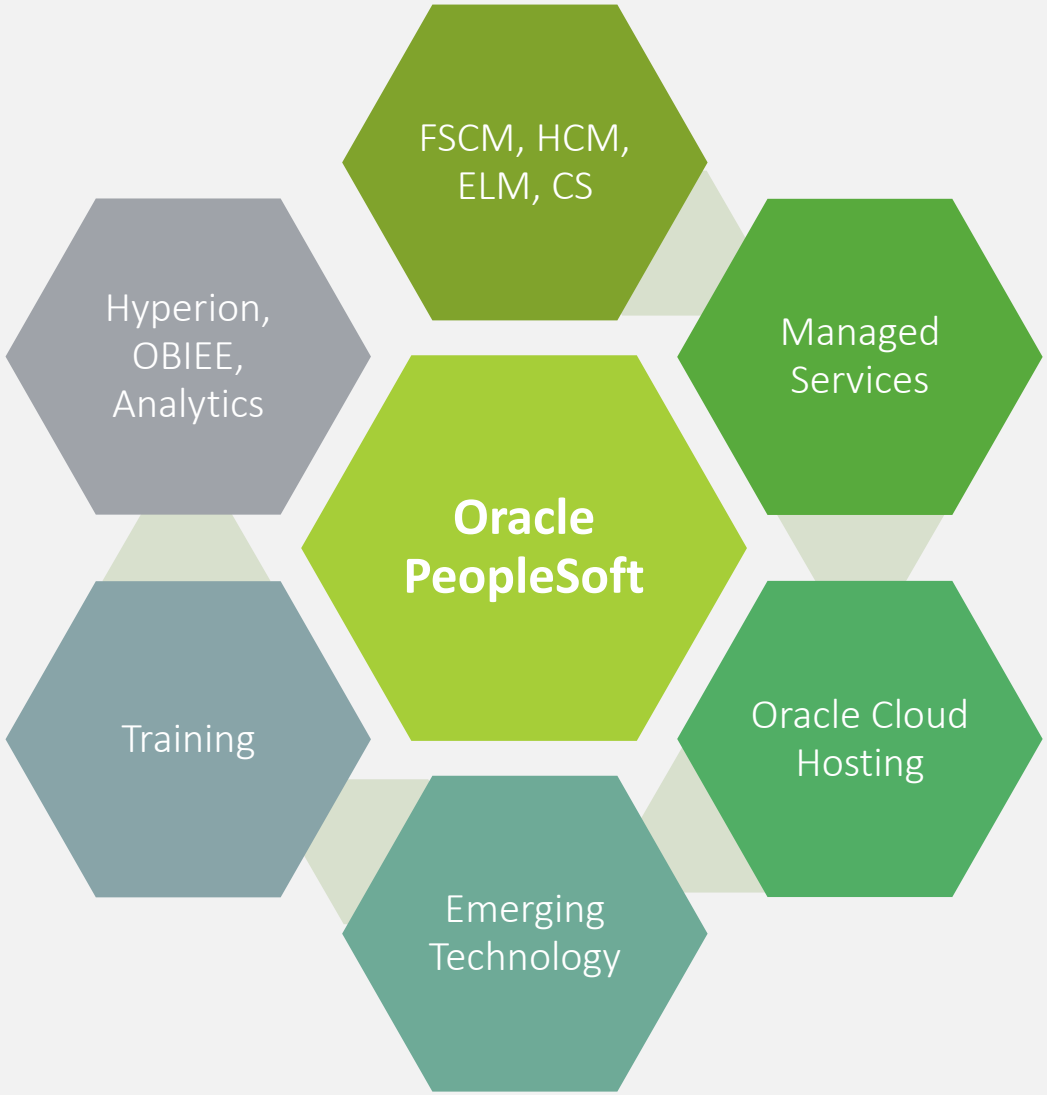
Our Services



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About SpearMC

An Oracle Platinum Partner, we specialize in:

- PeopleSoft ERP, SCM, HCM, ELM and Campus Solutions
- PeopleSoft Application Support Managed Services
- PeopleSoft and Tools Training
- PeopleSoft Hosting on OCI
- PeopleSoft Test Framework and Test Automation
- PeopleSoft PUM Update and Testing as a Service
- Oracle Guided Learning
- Kibana Anayltics

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PeopleSoft Grants LCD Solution

PeopleSoft extension providing the ability to perform:

- Labor Cost Distribution and Effort Certification
- Effort Commitments
- Total Professional Effort Planning
- Redistributions and benefits calculation features and capabilities
- Workflow
- Dashboard reporting

Built in 100% PeopleTools

- 100% Custom Objects – minimal impacts by upgrades/images
- Highly Configurable
- Extendable within defined design conventions

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Three Integrated Modules

- Comprised of 3 Modules
  - LCD / Certified
  - Committed
  - Workload Planning

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Three Integrated Modules

LCD / Certification

- Closes Gaps in delivered PeopleSoft HCM functionality for Research Accounting
- Create Labor Accounting Distributions for future payrolls
- Redistribute Labor Accounting for historic payrolls
- Manage Benefit Allocations to follow payroll
- Manage Committed and Over the Salary Cap Cost Share Requirements

Committed Effort

- Tracks commitments of individuals over the lifetime of a sponsored project
- Allows for effort devoted to a sponsored program to “ebb and flow” from one semester to the next as long as the overall commitment to the sponsor is met
- Ensures that employees are not overcommitted across all sponsored programs at any point in time - allowing for greater visibility into current and pending commitments
- Manage Committed and Over the Salary Cap Cost Share Requirements

Total Workload Planning

- Tracks total professional commitments for research and non-research employment obligations over time
- Used to capture proposed effort, pending awards, course detail, “protected time”, etc.
- Fully integrated with Committed module data
- Includes 100% of an employee’s time

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Cost Sharing and Salary Cap

- Mandatory Committed Cost Sharing (MCS)
  - Cost sharing that is required by the sponsor as a condition for proposal submission and/or award acceptance.
- Over the Salary Cap Cost Sharing (OTC)
  - Cost Sharing resulting from an employee's IBS being higher than the salary cap limitations placed on the research projects on which they are working. Per federal guidelines, the OTC calculations need to be supportable for whatever Committed Effort is budgeted (or certified) for the employee on the project. Audit support needs to be provided to show the OTC amount is being covered by non-federal funding.
- Voluntary Cost Sharing (VCS or VUCS)
  - Cost sharing that is not in the proposal or award that is voluntarily contributed to the project by people working on the project. It equates to effort applied to the research over and above what is billed to the project plus mandated as a cost sharing obligation. There is no requirement to track such cost sharing in relation to the project.

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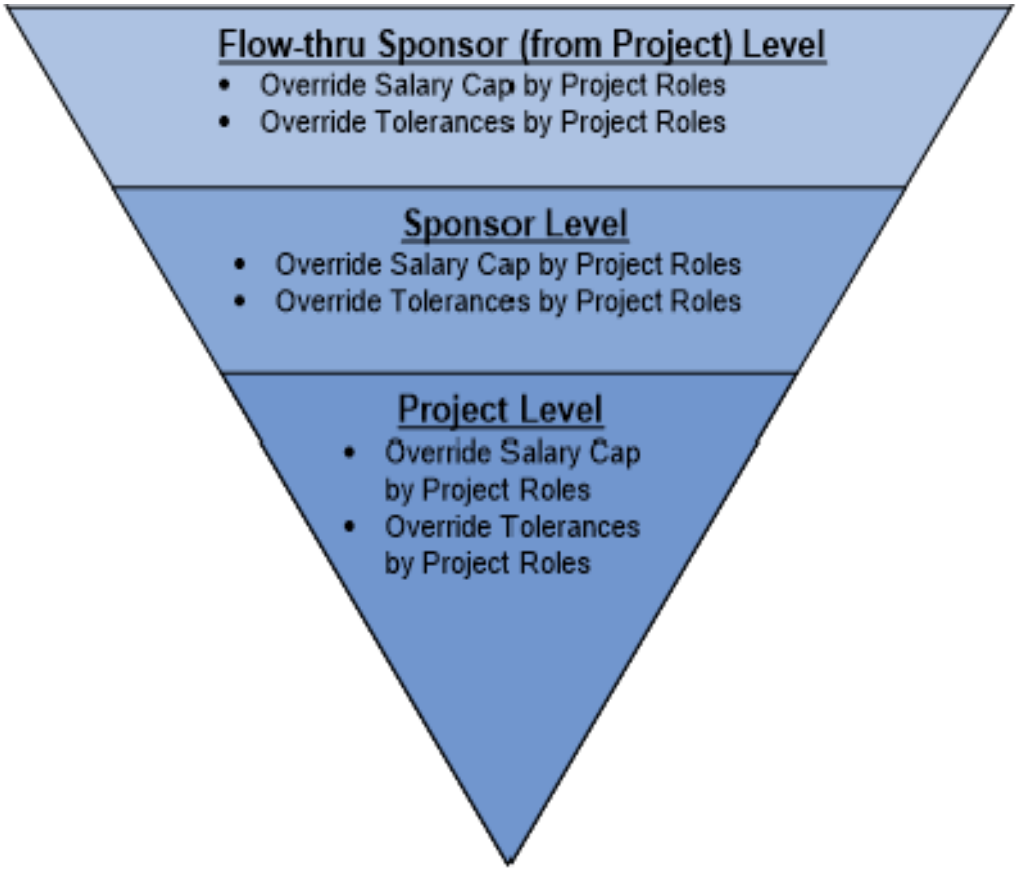
Salary Cap



- Salary Caps can be set at multiple points in a default hierarchy and can be different based on needs
- Entering the Salary Cap at any of the levels below will allow for calculation and enforcement (where rules have been established)

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Solution Overview

- Comprised of 3 Modules
  - LCD / Certified
  - Committed
  - Workload Planning

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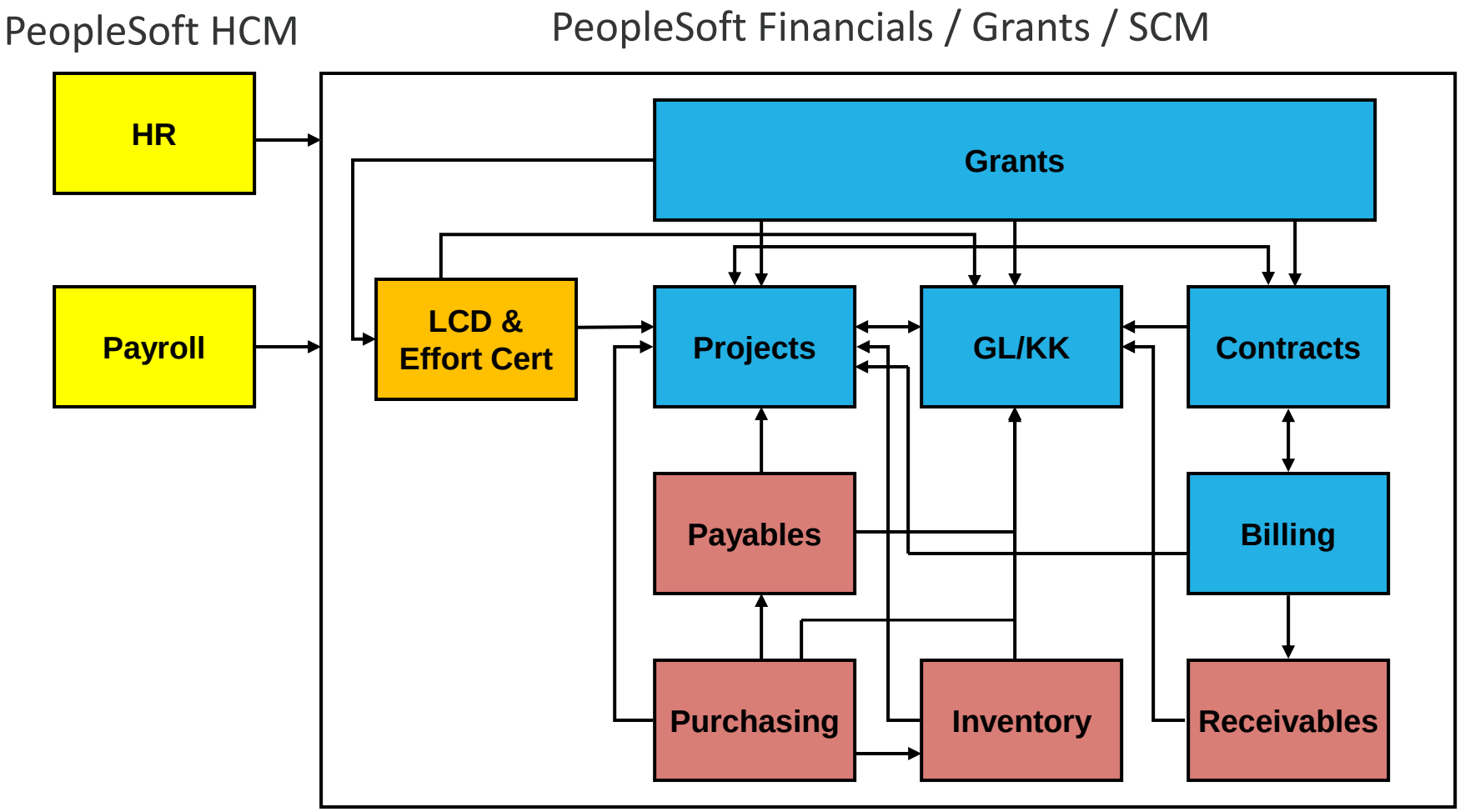
LDC Integration



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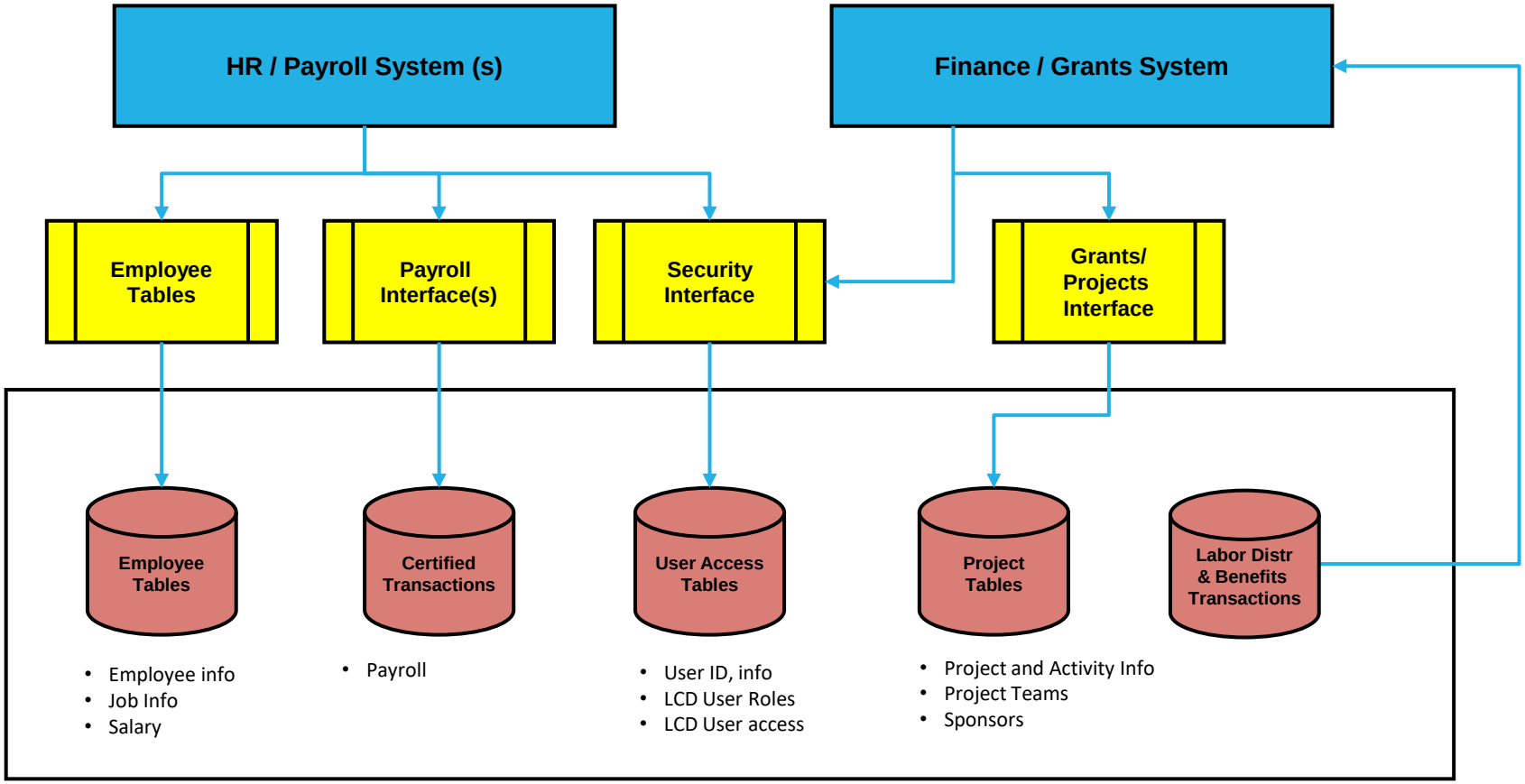
LCD / Certification



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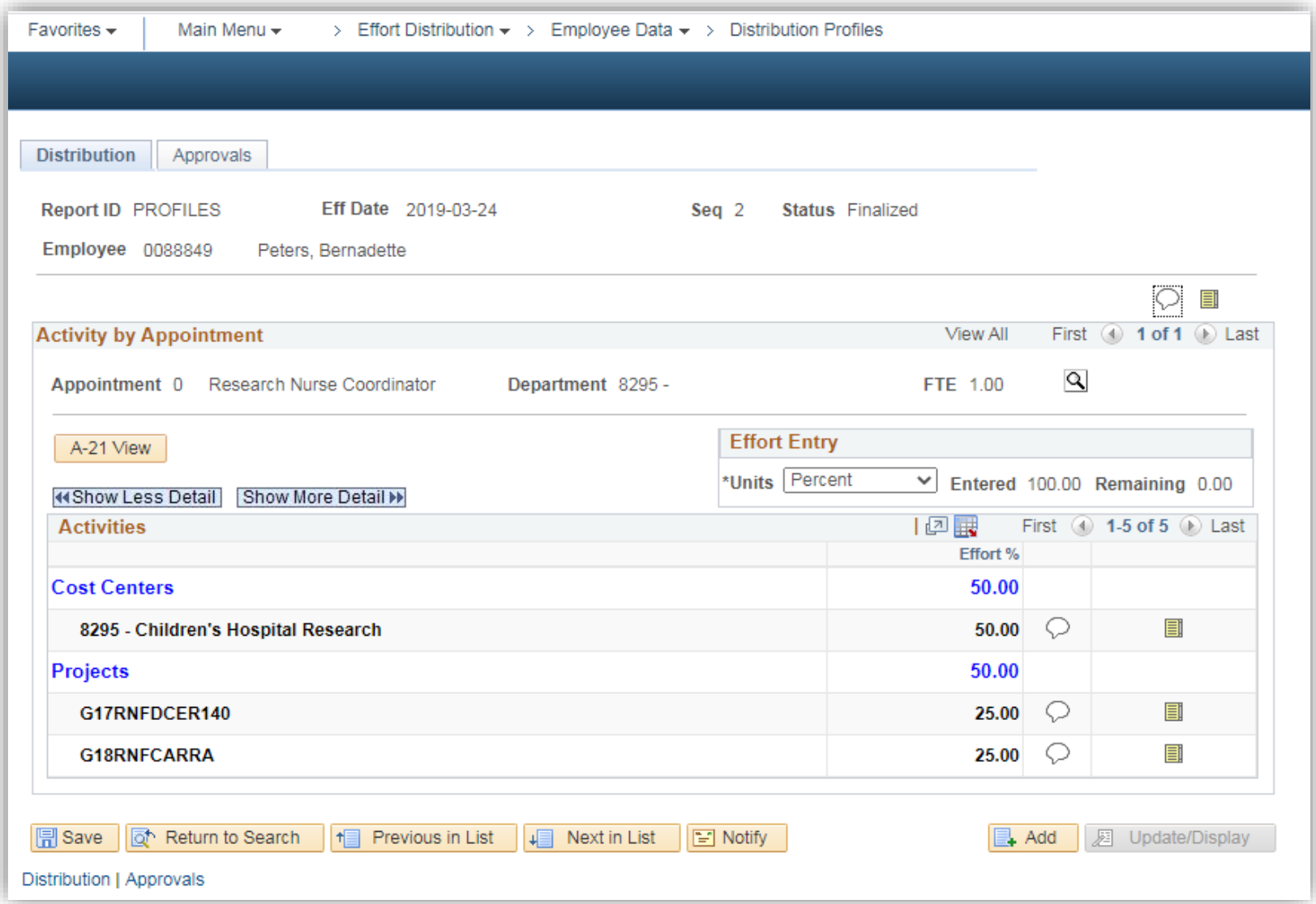
Distribution Profiles



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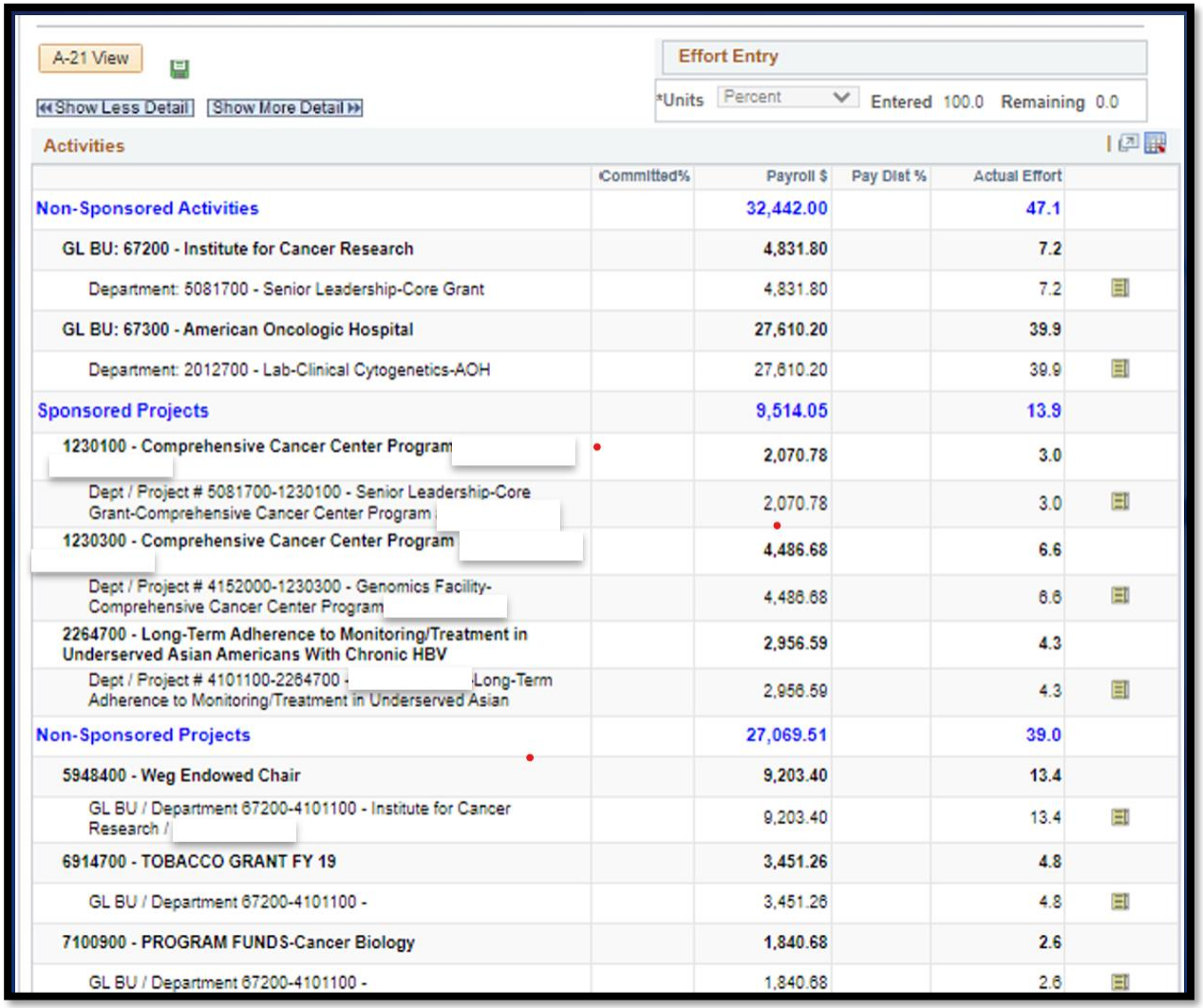
Alternative Page Configurations



A-21 View

Effort Entry

Show Less Detail | Show More Detail

*Units Percent Entered 100.0 Remaining 0.0

Activities

	Committed%	Payroll $	Pay Dist %	Actual Effort
Non-Sponsored Activities		32,442.00		47.1
GL BU: 67200 - Institute for Cancer Research		4,831.80		7.2
Department: 5081700 - Senior Leadership-Core Grant		4,831.80		7.2
GL BU: 67300 - American Oncologic Hospital		27,610.20		39.9
Department: 2012700 - Lab-Clinical Cytogenetics-AOH		27,610.20		39.9
Sponsored Projects		9,514.05		13.9
1230100 - Comprehensive Cancer Center Program		2,070.78		3.0
Dept / Project # 5081700-1230100 - Senior Leadership-Core Grant-Comprehensive Cancer Center Program		2,070.78		3.0
1230300 - Comprehensive Cancer Center Program		4,486.68		6.6
Dept / Project # 4152000-1230300 - Genomics Facility-Comprehensive Cancer Center Program		4,486.68		6.6
2264700 - Long-Term Adherence to Monitoring/Treatment in Underserved Asian Americans With Chronic HBV		2,956.59		4.3
Dept / Project # 4101100-2264700 - Long-Term Adherence to Monitoring/Treatment in Underserved Asian		2,956.59		4.3
Non-Sponsored Projects		27,069.51		39.0
5948400 - Weg Endowed Chair		9,203.40		13.4
GL BU / Department 67200-4101100 - Institute for Cancer Research /		9,203.40		13.4
6914700 - TOBACCO GRANT FY 19		3,451.26		4.8
GL BU / Department 67200-4101100 -		3,451.26		4.8
7100900 - PROGRAM FUNDS-Cancer Biology		1,840.68		2.6
GL BU / Department 67200-4101100 -		1,840.68		2.6

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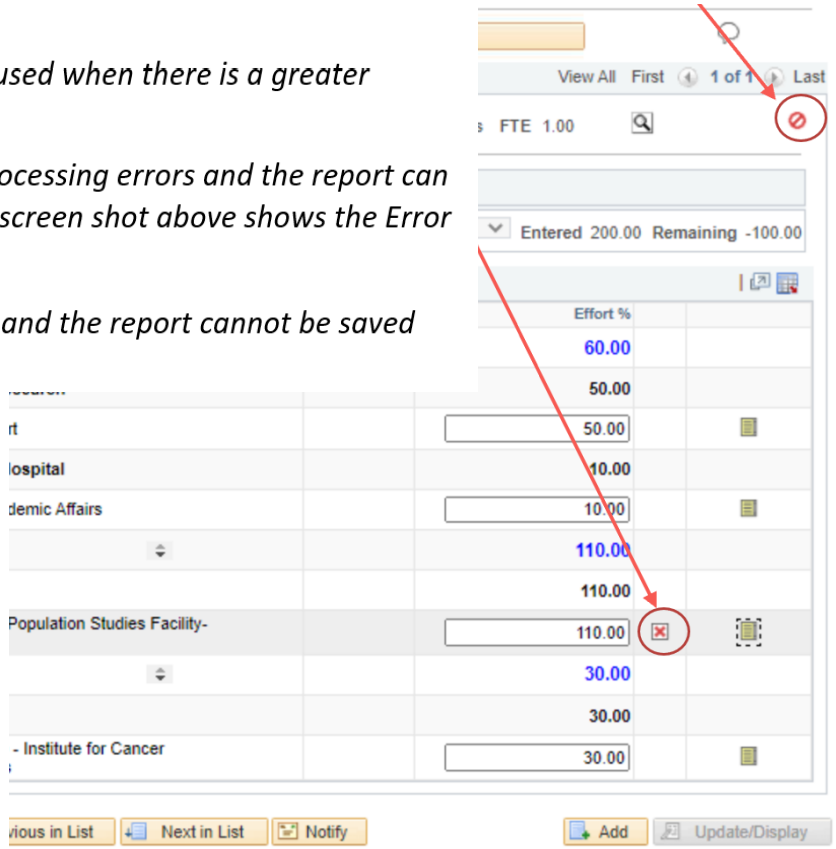
Rules and Severities

Rules can be configured with the following "severity" options and the level of severity can be varied for different roles within the workflow path:

- ***Informational*** – *This identifies a condition on the report that should be called to the attention of the users entering or reviewing this Distribution Report but will not prevent Approving the profile.*
- ***Warning*** – *Similar to above but with a different icon and used when there is a greater potential for issues if not resolved.*
- ***Error*** – *The identified condition will cause down-stream processing errors and the report can be saved but not Approved until the condition is resolved. The screen shot above shows the Error icon.*
- ***Cancel*** – *The identified condition is invalid at the line level and the report cannot be saved until it is resolved.*



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Effort Certification

- Pay Periods Consolidated into Effort Periods
- Workflow enabled
  - Employee Supervisor
  - PI / Employee
  - Research Administrator
- Features include:
  - Role-specific data views, actions and certification/approval messages
  - Full audit trail
  - Tolerances
  - Comments

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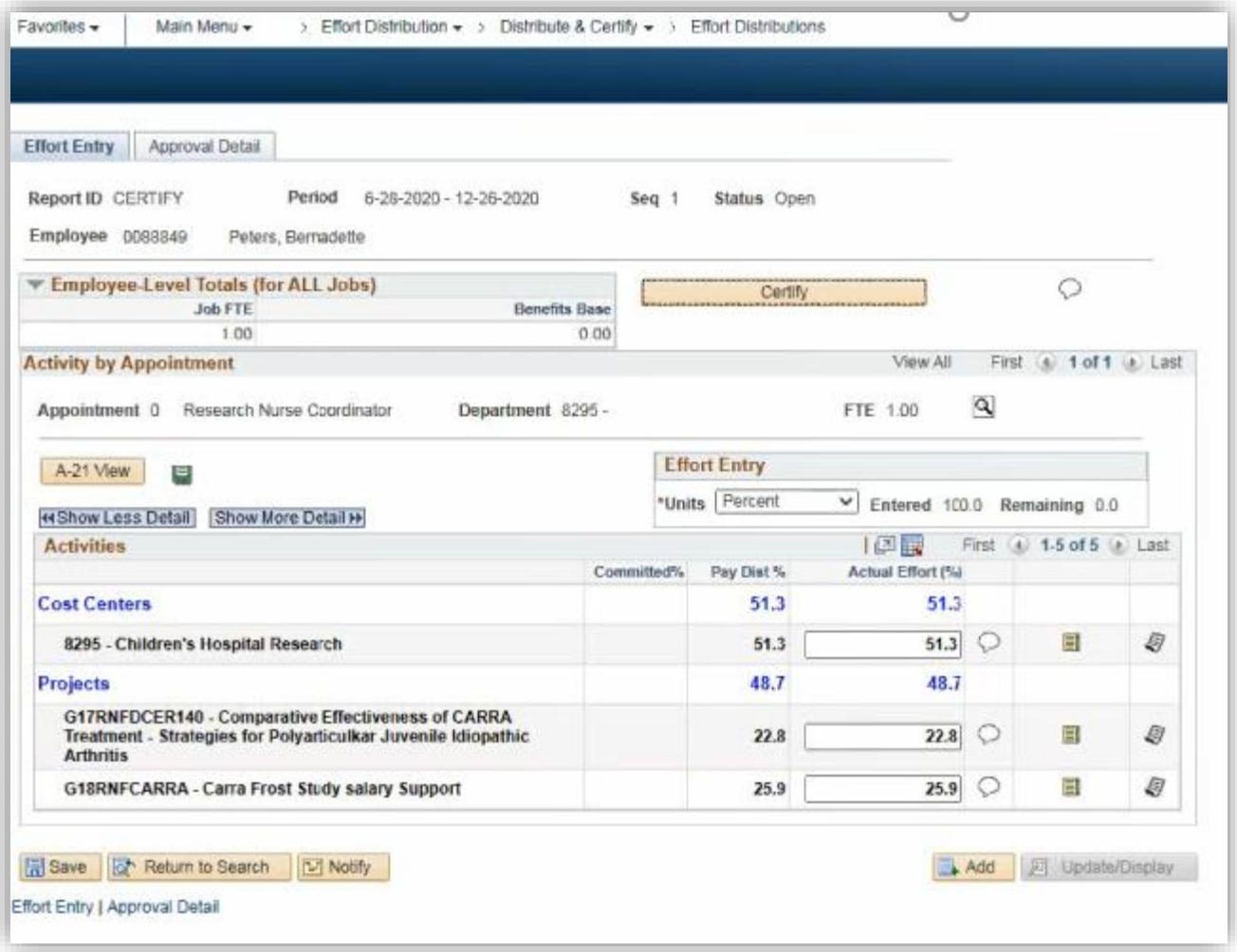
Effort Certification



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Three Integrated Modules

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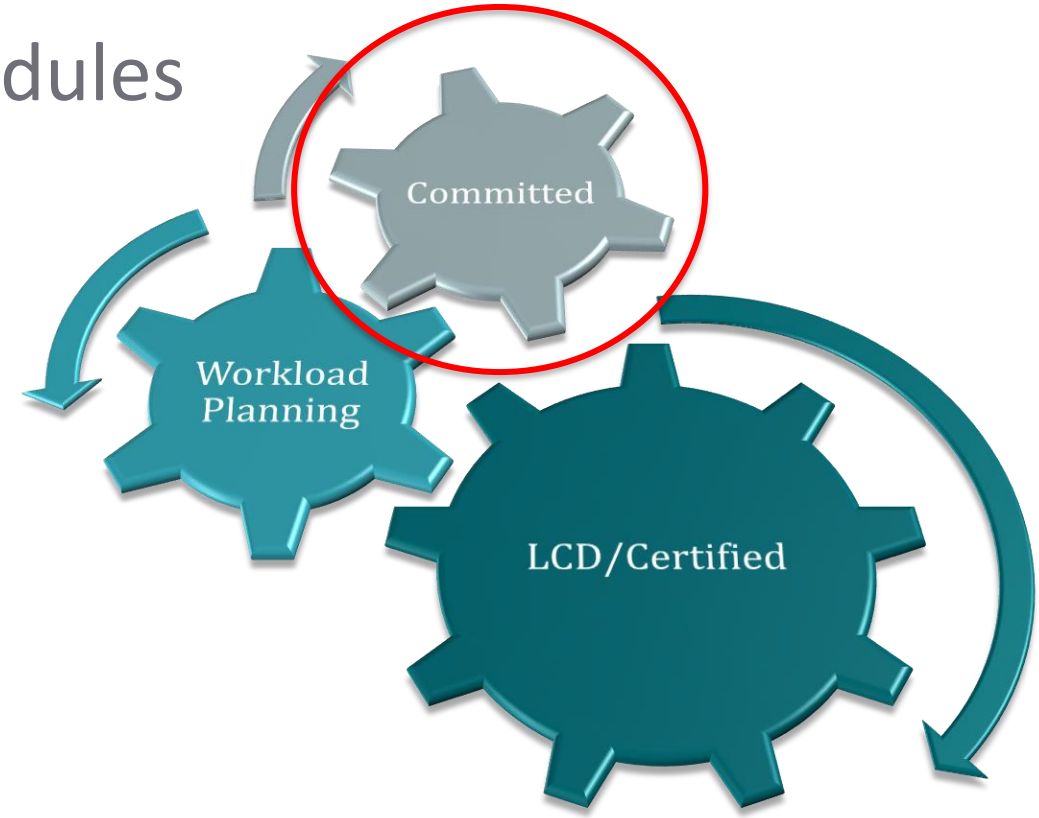

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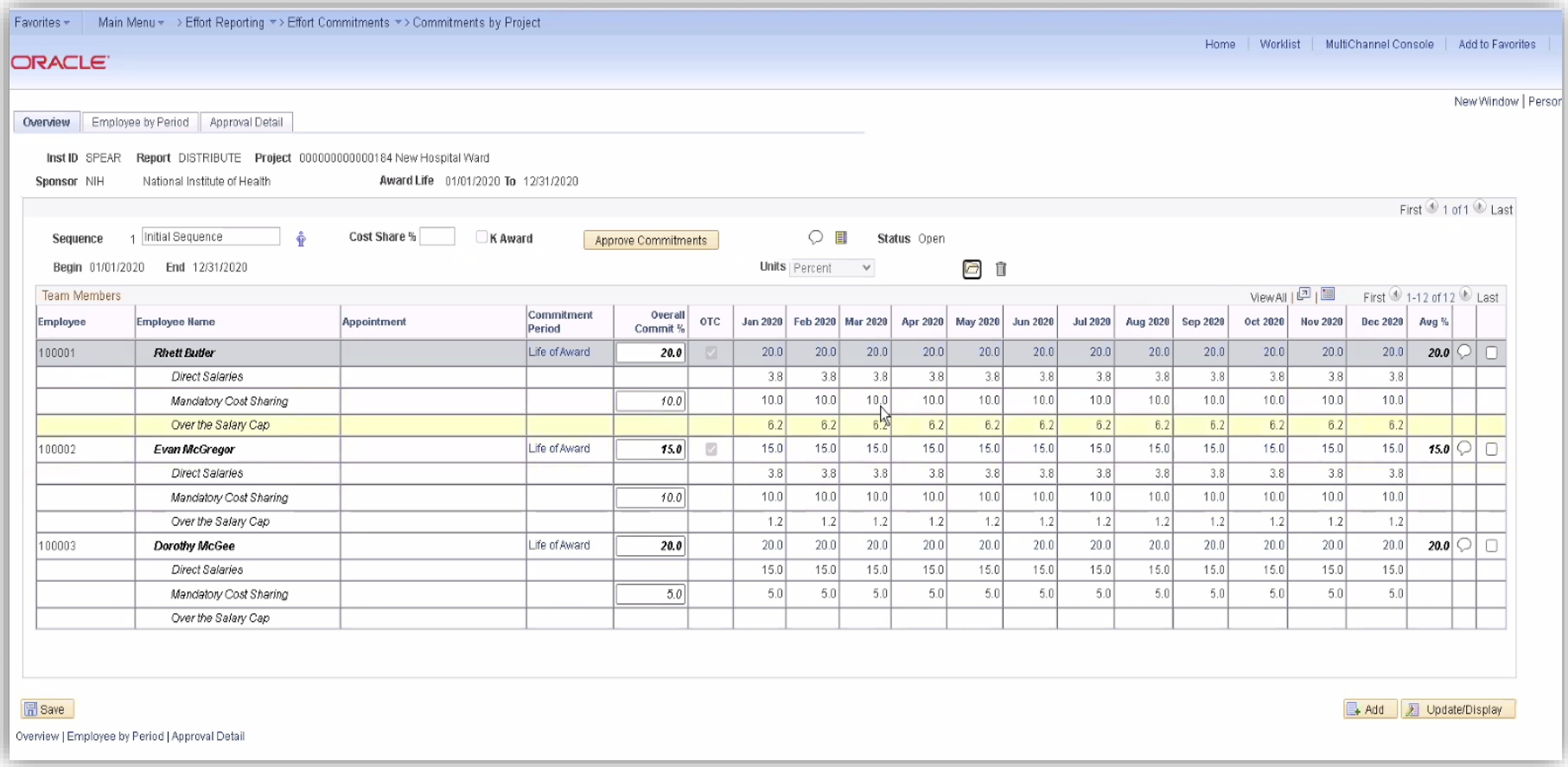
Commitments Module:
Project Team and Duration Planning



Employee	Employee Name	Appointment	Commitment Period	Overall Commit %	OTC	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020	Avg %
100001	***Rhett Butler***		Life of Award	**20.0**	☑	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	**20.0**
	Direct Salaries					3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	
	Mandatory Cost Sharing			10.0		10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	
	Over the Salary Cap					6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	
100002	***Evan McGregor***		Life of Award	**15.0**	☑	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	**15.0**
	Direct Salaries					3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	
	Mandatory Cost Sharing			10.0		10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	
	Over the Salary Cap					1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	
100003	***Dorothy McGee***		Life of Award	**20.0**		20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	**20.0**
	Direct Salaries					15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	
	Mandatory Cost Sharing			5.0		5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	
	Over the Salary Cap																	

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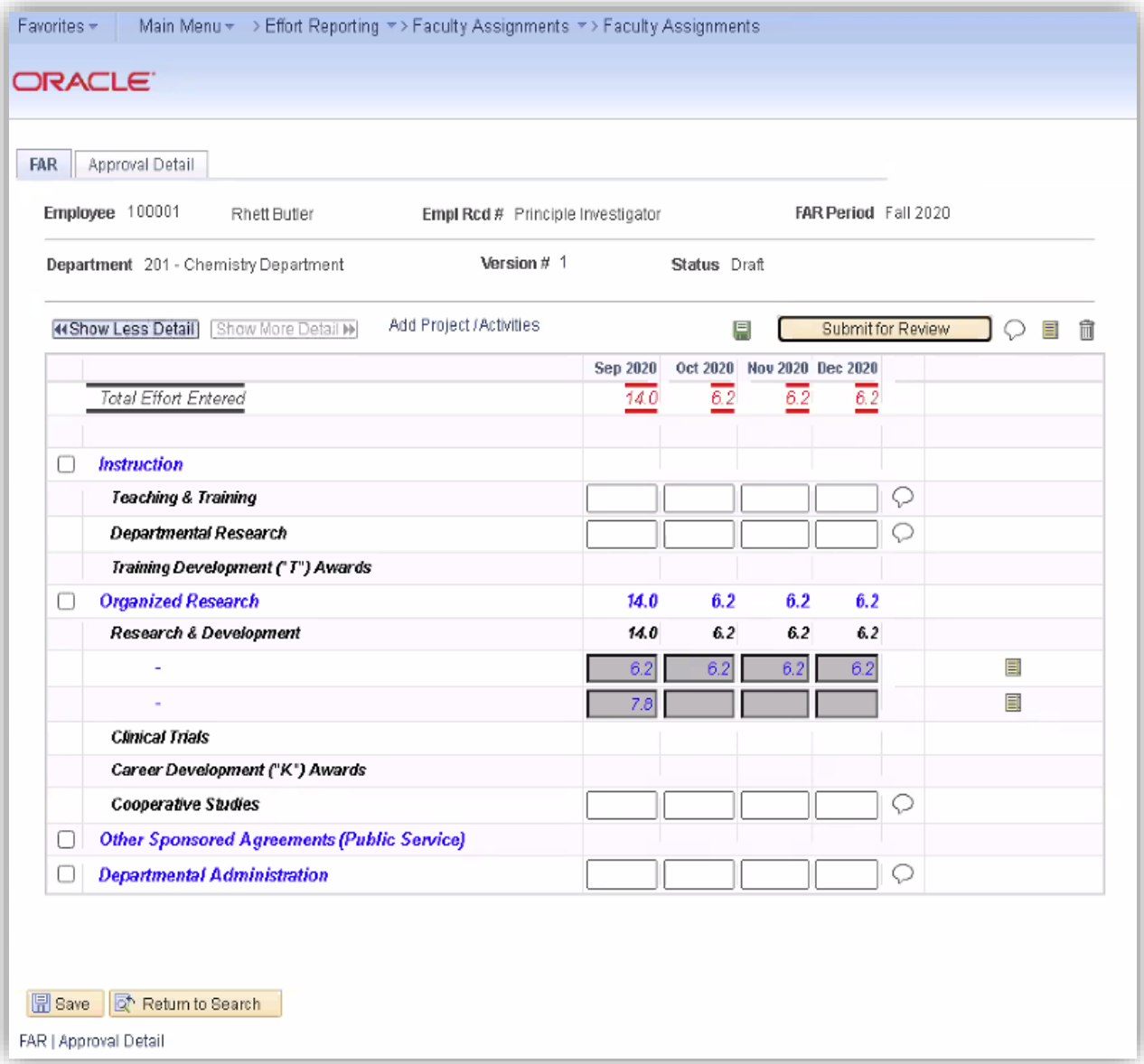
Total Workload Planning



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