

PeopleSoft 9.2 Grants Management (including PC/CA/AR/BI)

Financial Supply Chain Management (FSCM)

Developed for implementation team members and functional end users, PeopleSoft Grants Management 9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the Grants module. Through scenarios, real-world experiences from implementers, and hands-on activities, students gain an understanding of how to establish process and report on transactions.

Prerequisites:

- PeopleSoft 9.2 Foundations (FSCM)

Introduction

- Grants Management Overview
- Resources/Tools
- Integration with PeopleSoft Applications
- Grants Life Cycle
- Project Costing Chartfield Structure

Grants Configuration Order and Defaults Consideration

- Configuration Order
- Commitment Control Overview
- Products & Product Defaults

Defining Business Unit and Award Set Up

- Contracts BU Definition
- Project Costing BU Definition
- Award Set Up and BU Definition
- Facilities Admin Options
- Direct Cost Sharing

Structuring Grants

- Institution Control Table Set Up
- Sponsor Control Table Set Up
- Professional Control Table Set Up
- Proposal Control Table Set Up
- Milestone Type/Code Set Up
- Accounting Rules Set Up

Maintaining Grants

- Creating Institutions
- Creating Sponsors
- Maintaining Grants Departments
- Creating Sub-recipients
- Defining Contracts Workbenches

Grants Security

- Defining Grants Security

Pre-Award

- Creating a Proposal
- Reviewing a Proposal Budget
- Coping a Proposal/Version/Budget Period
- Submitting a Proposal

Negotiate Award

- Negotiating an Award

Generate Award

- Generating an Award

Award Set Up

- Updating an Award Profile
- Updating a Contract
- Updating a Project
- Updating an Activity
- Posting a Grants Budget
- Reviewing Budget Details/Overview

Blue Bird Award

- Creating an Award without a Proposal

Funds Distribution

- Setting up Funds Distribution
- Running Funds Distribution

Manage Grant Costs

- Running Cost Collection
- Reviewing the Transactions List
- Limit Processing

Processing Facilities & Administration

- Understanding the F&A Process
- Processing Facilities & Administration
- Processing F&A Adjustments

Revenue Recognition

- Processing As Incurred Revenue

Billing

- Processing As Incurred Billing
- Streamlined Billing
- Billing Worksheet
- Letter of Credit Processing
- Billing Batch Processing

Collections and Payment Application

- Creating and Applying Payment
- Refunds & Direct Journals

GL Integration

- Journal Generating
- Integration and Reconciliation Considerations

Grants Reporting

- Grants WorkCenter
- Grants Portal
- Contracts Workbench
- FFR

Create Non-Competing Continuation

- Creating a Non-Competing Continuation

Grants Close Out

- Closing a Project
- Closing Budget
- Closing a Contract
- Closing an Award

Grants Workflow

- Milestone
- Proposal
- Protocol

Appendix

- Grants Portal Set Up
- Protocols
- Unlocking Proposals
- Add/Adjust Transactions
- Supplemental Data
- Pre-paids

