

# PEOPLESOFT ENTERPRISE GRANTS



*Seamlessly manage pre- and post-award processes*

*Streamline administrative tasks*

*Comply with sponsor and institutional requirements*

*Oracle's PeopleSoft Enterprise Grants solution helps you make the most of your resources so that you can focus your efforts on growing your portfolio of federal grant awards, increase operational efficiencies, adhere to regulatory requirements, and drive fiscal accountability throughout your organization. It's possible with advanced technology which manages the complete lifecycle of your federal-funded research and projects.*

## **Streamline Administration**

With PeopleSoft Grants, you can truly maximize your limited resources. Built on best-practice business processes for grant administration, the solution guides users through the full range of pre- and post-award processing to boost productivity, facilitate precision processing, and ensure compliance. Templates and defaults automate key functions while workflow capabilities streamline administrative activities and automate approvals. Yet the solution also offers built-in flexibility so that you can meet the specific needs of your sponsors, as well as those of your institution or agency:

- Generate proposals quickly and efficiently.
- Manage complex grant proposals that include complex relational structures, varying sites and rates, and multiple budgets.
- Generate standard grant applications and cost reports by using Oracle's XML publisher tool.
- Automatically create the required elements for award management from your proposal data using the generate process that sets up budget data, revenue and billing requirements, and more.
- Set up configurable workflow templates to automate the business process of submitting, reviewing and approving Grant Protocols and Grant Proposals, and facilitate efficient communication between the different project roles through all aspects of the Protocol/Proposal lifecycle.
- Capture required protocol elements for animal and human testing and manage the protocol review and approval process using delivered automated workflow.
- View online approval and status history.
- Track and monitor your projects from a role-based portal.
- Specify prepaid/advance setup data at the Contracts business unit level, such as prepaid tax timing and billing plan template data, to automatically populate

some of the prepaid/advance set up fields when creating an advance line.

- Access advance funds prior to billing for the initial funds.
- Monitor the balance, use, and expiration date of individual advances, as well as view the overall totals for all advances associated with an award.
- Ensure that awards are properly closed with an automated, system-based audit of required closeout activities.

### Single Source of Information

PeopleSoft Grants lets employees view and share the same enterprise-wide data from any computer that is connected to the internet. By bringing together disparate information and connecting people to a single source of information, PeopleSoft Grants enables all your employees to manage their day-to-day activities with complete confidence in the financial and operational data.

- Empower employees to make faster, smarter decisions with secure, role-based access to a single source of information.
- Assign selected users to a workflow bypass role to enable them to bypass workflow processing for proposals that are already institution approved through the workflow process.
- Enable collaboration between principal investigators, program directors, and other employees with a central repository of proposal and award information.
- Enable increased flexibility when copying proposals and proposal versions by selecting to either enforce system assigned proposal and proposal version numbering, or allowing manual proposal and proposal version numbering.
- Store multiple CFDA numbers for the proposal and award using the new CFDA page that can be accessed through a link on the proposal and award.
- Search for available grant opportunities from within PeopleSoft Grants by configuring the Sponsor Website Setup page which can be customized to contain up to six logical sponsor groupings of web links to your various sponsors.
- Deliver real-time reports that use accurate, consolidated data.
- View the overall funding about by award as well as by individual contract line and project using the new Funding Inquiry page.

Sponsor Website Setup

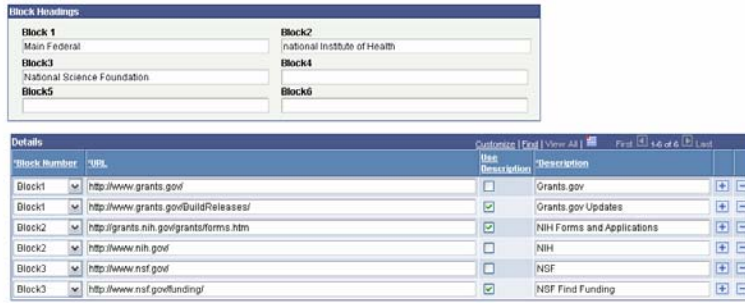


Figure 1: Define up to six sponsor website URL's that can be used to research available grant opportunities. Identify whether the system displays the website address or the description as the link on the Sponsor Websites page.

Robust Documenting and Tracking

PeopleSoft Grants provides an automated system that has the ability to document and amend human and animal protocols, and to facilitate the management of the necessary approval processes for the approving authority. Protocol processing provides the ability to track multiple versions of a protocol, create a new protocol, and copy protocols for modification or renewal.

- Capture all data elements required to submit a protocol application for both the Institutional Review Board (IRB) and IACUC approval review process.
- Copy a protocol and version for modification, renewal, and for a new protocol.
- Track all history of change on a protocol.
- Workflow protocol to multiple individuals and committees for various actionable events, such as email notifications of committee meeting dates, agenda, dispositions to Principal Investigator (PI), adverse events, and others.
- Renew an approved protocol.

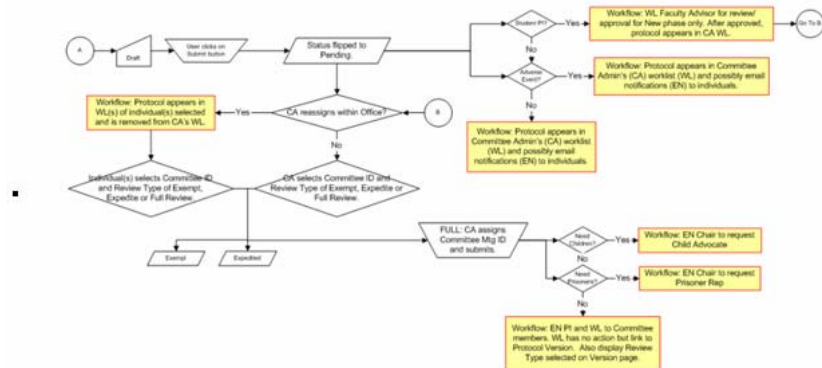
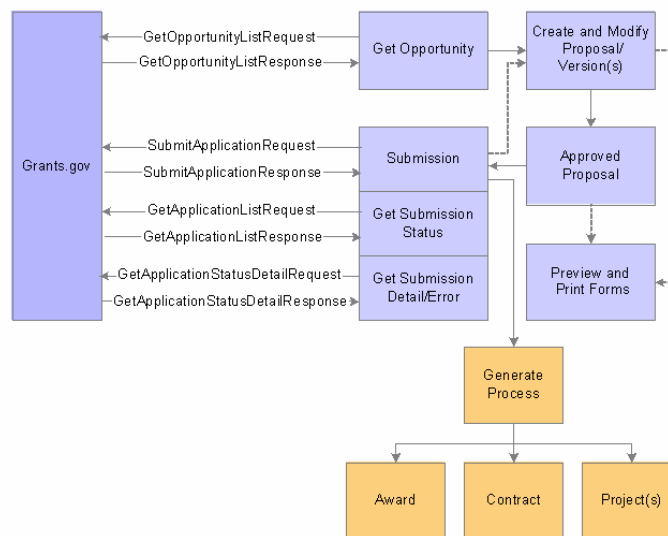


Figure 2: Protocol Management workflow process.

Sustainable Compliance Requirements

PeopleSoft Grants enables you to invoke the web services that are provided by Grants.gov to get the list of the opportunities and applications and status of an application and to electronically submit all of the schemas included in the SF 424 R&R family. Additionally, PeopleSoft Grants enables you to print the SF 424 application using Oracle's XML Publisher tool.

- Submit applications electronically to Grants.gov using the XML format (SOAP) with attachments.
- Use the delivered GetOpportunityList web service to return a list of opportunities complete with all schemas necessary to prepare your application.
- Select an opportunity to create a proposal and bring the opportunity data forward into the proposal component along with all the schemas associated with the opportunity.
- Generate and print the SF 424 R&R family of forms right from the component that you use to submit the proposal.
- Retrieve a list of applications that you submitted to Grants.gov and track their processing status using the delivered GetApplicationList web service.
- View the current status detail for your submitted proposal within the proposal component.
- Invoke the delivered GetApplicationStatusDetail web service to update the Grants.gov processing status, the status date and time, and display the agency tracking number if the application was accepted by an agency.



**Figure 3: Electronic Submission process flow: Use the delivered web services to seamlessly research and retrieve available grants opportunities and submit your proposals electronically to the appropriate funding agency through Grants.gov.**

### Integrated, End-to-End Solution

PeopleSoft Grants is a web-based solution that streamlines the full range of pre- and post-award processes. PeopleSoft Grants integrates with a wide range of

complementary PeopleSoft Enterprise applications, as well as with third-party systems, for a truly enterprise-wide grants management solution that results in the only grants management solution that seamlessly manages the complete grant lifecycle from proposal to award.

- Seamlessly transition proposals into awards with the click of a button.
- Automatically create budgets directly from proposal data.
- Review and access journal entries, expenditures, requisitions, purchase orders, vouchers, and payroll costs—in real time.
- Drill down into transactional systems for more detailed information on individual transactions.

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