

# PeopleSoft Grants



Oracle's PeopleSoft Grants solution helps you make the most of your resources so that you can focus your efforts on growing your portfolio of sponsored awards, increase operational efficiencies, adhere to regulatory requirements, and drive fiscal accountability throughout your organization. With role-focused interfaces, alerts, and tools, you can drive better performance compliance throughout the lifecycle of your sponsored projects.

## KEY BENEFITS

- Seamlessly manage pre- and post-award processes
- Streamline administrative tasks
- Comply with sponsor and institutional requirements

## Gain Efficiencies with Configurable Tools and Frameworks

With the Grants WorkCenter you can leverage a host of configurable new tools, technologies and frameworks focused on providing a simple and actionable user experience coupled with productivity enhancers to drive tangible business results.

Sponsored project administration staff can use the WorkCenter to manage end-to-end business processes across modules and catch issues before they become problems. This new work paradigm is tailored to fit your user's roles providing quick and easy access to specific content-rich data from one location.

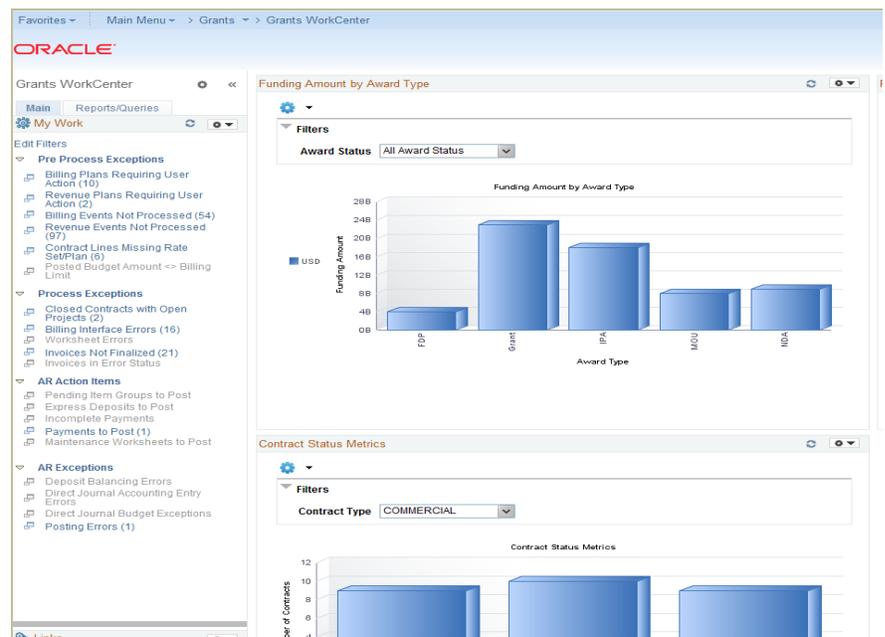


Figure 1. The Grants WorkCenter with focus on the Grants WorkCenter Dashboard including targeted user- configurable, actionable charts

Configurable, exception-based analytics deliver content specific to users, direct their



focus on what they need to see, and offer in-context actions to resolve or research issues from one location. Mass update user interfaces provide the ability to rapidly act against multiple business objects and make the award management process highly efficient.

Pivot grid analytical technology embedded within the PeopleSoft applications provides users with information specific to their grants and helps them to quickly and independently answer a variety of questions related to award status and financial progress, as well as adapt the pivot grids as business process needs evolve.

## Streamline Administration

With PeopleSoft Grants, you can maximize your limited resources. Built with the experience and input of dozens of research institutions and other sponsored project-driven organizations, the solution guides users through the lifecycle of pre- and post-award processing to boost productivity, facilitate accurate accounting and documentation, and ensure compliance. Templates and defaults automate key functions while workflow capabilities streamline administrative activities and automate approvals. Yet, the solution also offers flexibility so that you can adjust to the specific needs of your sponsors, as well as those of your institution or agency. PeopleSoft Grants enables you to:

- Generate proposals quickly and efficiently from external systems via integration web services or Component Interfaces.
- Assign one or more Principal Investigators (PIs) on individual grants.
- Manage 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.
- Generate a system produced SF-425 Federal Financial Report that can be edited online to meet institution-specific award reporting needs.
- 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.
- Enter and track sponsor and institution-specific informational data elements through the use of the supplemental data framework.
- 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.
- View online approval and status history.
- Track and monitor your projects from a role-based portal.
- Specify prepaid/advance defaulting rules to automatically populate data 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.
- Control the order of transaction billing through a configurable limit checking template to ensure compliance with sponsor billing requirements.
- Ensure that awards are properly closed with an automated, system-based audit of required closeout activities.

- Capture required protocol elements for animal and human testing and manage the protocol review and approval process using delivered automated workflow.

## 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.
- 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 by award as well as by individual contract line and project using the Funding Inquiry page.
- View and access critical grant-related information from the PeopleSoft Contracts, Project Costing, and Grants applications through the Contracts Workbench, a single-page, configurable interface that provides access to various controls, statuses, and transactions.

## Centralized Grants Portal

The Grants Portal provides principal investigators, project managers, department administrators, and other staff members that participate in grant-funded projects with an easy to use portal. The Grants Portal allows users to efficiently access and manage the various facets of grants, especially their awards, grant projects, and resources associated with those projects.

The Grants Portal provides:

- the ability to drill down into the detail of transactions and documents
- budget, commitment, and actual financial statistics and balances by award, project, and resource
- personnel cost detail and summaries
- flexible saved search criteria that each user can personalize
- a self-service security layer to enable administration of access to the Grants Portal something that business analysts and non-IT resources can manage.
- links to other key features in PeopleSoft Grants

With the Grants Portal, tools and essential information can be placed into the hands of staff that are closest to the sponsored projects and have fiscal responsibility for valuable grant-funded initiatives.

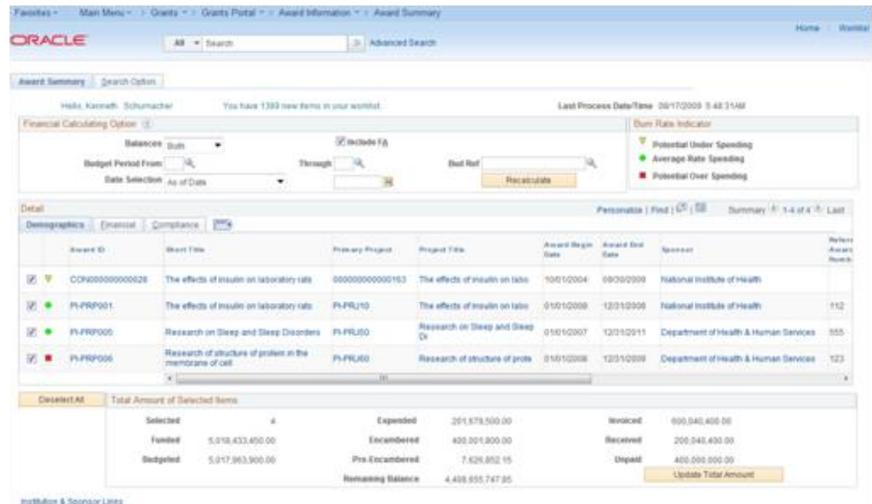


Figure 2. The Grants (PI) Portal provides the user with the ability to efficiently access and manage all facets of grants. Burn rate and award and project financial summaries are presented at a glance with the ability to drill down into the grant award.

## Integrated, End-to-End Solution

PeopleSoft Grants is a web-based solution that streamlines the pre- and post-award processes. It integrates with a wide range of complementary PeopleSoft applications, as well as with third-party systems, to offer a uniquely flexible platform for controlling and managing 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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### Hardware and Software, Engineered to Work Together

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