

Oracle - PeopleSoft Grants

Code:	D81130GC20
Length:	5 days
URL:	View Online

This PeopleSoft Grants training teaches the fundamental concepts and features of the PeopleSoft Grants solution. Expert Oracle University instructors will teach you how to perform the steps required to set up the Grants system, enabling you to create a proposal, generate an award, manage the award budget, generate invoices and recognize revenue for award transactions and any associated facilities and administration costs.

Learn To:

- Create a proposal.
- Generate an award and manage the award budget.
- Generate invoices and recognize revenue for awards.
- Process proposals through the review and approval process.
- Setup and manage protocols.
- Set up and use the Grants Portal.
- Manage cost sharing.
- Understand award advances and protocols.

Benefits to You

Taking the time to complete training gives you a chance to learn about the relationships between PeopleSoft Grants, Contracts, Project Costing and Commitment Control. You'll walk away knowing how to set up a Grants business unit, define sponsor budget items and proposal budget and process an award budget. By enrolling in this course, you'll also develop the skills to create a detailed proposal and generate an award.

Participate in Hands-On Exercises

Using work flow, you will learn how to process proposals and protocols through the review and approval process. Through participating in interactive lessons and hands-on activities, you'll gain an edge by learning to implement and process grants in accordance with your business needs.

Skills Gained

- Describe PeopleSoft Enterprise Grants key features
- Evaluate award funding in accordance with government regulations
- Generate Grants revenue and billing transactions
- Prepare proposals and generate awards
- Prepare your PeopleSoft Enterprise Grants system for implementation
- Set up and use the Grants Portal
- Setup and manage protocols

- Close awards

Who Can Benefit

- Implementer

Course Details

Topics

- Preparing to Implement Grants
- Setting Up Facilities and Administration Cost Parameters
- Setting up Billing and Revenue Control Tables
- Defining Your Institution
- Setting Up Professionals in Grants
- Defining Award Sponsors
- Preparing Grants Proposals
- Managing Awards
- Processing Grants Transactions
- Managing Revenue and Facilities and Administration Costs for Awards
- Managing Award Billing
- Managing Cost Sharing Using Grants
- Managing Advances
- Setting Up and Managing Protocols
- Closing Out Awards
- Evaluating Award Funding in Accordance with Government Regulations
- Setting Up and Using the Grants Portal

- Explaining the Grants Integration Points
- Explaining the Relationship Between PeopleSoft Enterprise Commitment Control and Grants
- Explaining the Relationship between PeopleSoft Enterprise Contracts, Project Costing, and Grants
- Setting Up a Grants Business Unit
- Setting Up System-level Default Values
- Setting Up User Preferences

Setting Up Facilities and Administration Cost Parameters

- Describing the Facilities and Administration Calculation Process
- Setting up Facilities and Administration Trees
- Setting Up Facilities and Administration Options and Offsets
- Setting Up InterUnit and IntraUnit Processing Rules
- Setting Up Facilities and Administration Base Types
- Setting Up Facilities and Administration Rate Types

Setting up Billing and Revenue Control Tables

- Identifying the Components Required to Recognize Revenue and to Bill for Grant Awards
- Explaining the Grants Revenue Process Flow
- Explaining the Grants Billing Process Flow
- Explaining the Accounting Entries Created by the Revenue and Billing Processes in Contracts
- Setting Up an Unbilled Accounts Receivable Account
- Setting Up Accounting Rules for Award Lines
- Defining Distribution Accounting for Fixed-Amount Award Lines
- Setting Up Invoice Formatting Options

Defining Your Institution

- Setting Up Institution Profiles and Contacts
- Defining Facilities and Administration Rates for Your Institution
- Defining Fringe Rates for Your Institution
- Defining Budget Identifiers
- Setting Up Certification and Compliance Data
- Managing Institution Audit Records
- Setting Up Department Profiles and Contacts

Setting Up Professionals in Grants

- Explaining Professional Control Table Setup for Grants
- Setting Up Control Tables for Institution Professionals
- Setting Up Core Data for Institution Professionals
- Setting Up Grants-Specific Data for Institution Professionals
- Creating Biosketch Reports

Defining Award Sponsors

- Defining Sponsor Profiles and Contacts
- Defining Sponsor Forms
- Setting Up Sponsor Facilities and Administration Rates
- Defining Sponsor Budget Items

Preparing Grants Proposals

- Explain the Relationship Between Implementation Setup and Proposal Preparation
- Explaining the Proposal Preparation Process
- Explaining the Role of Workflow in Proposal Processing
- Setting Up Grants Security
- Preparing a Proposal
- Preparing and Managing a Proposal Budget
- Managing Proposals

Managing Awards

- Performing the Award Generation Process
- Managing Awards
- Managing Award Milestones, Projects, Activities, and Contracts
- Managing Award Budgets

Processing Grants Transactions

- Describing the Grants Transaction Process Flow
- Applying a Payable Transaction to a Funded Award
- Managing Transactions that are Applied to a Funded Award
- Managing Facilities and Administration Cost Calculations

Managing Revenue and Facilities and Administration Costs for Awards

- Explaining the Award Revenue Recognition Process Flow
- Explaining the Steps to Preparing Awards for Revenue Recognition
- Managing Award Revenue Plans
- Performing the Contract Activation Process
- Running the Revenue Recognition Process
- Managing Award Revenue

Managing Award Billing

- Explaining the Award Billing Process Flow
- Explaining the Steps to Preparing an Award for Billing
- Managing Contract Billing Plans
- Executing the Contracts and Billing Interface Process
- Managing Award Bills
- Managing Project Billing Data

Managing Cost Sharing Using Grants

- Explaining Cost Sharing Parameters for Grants
- Identifying Cost Sharing Analysis Types and Groups
- Explaining the Steps to Prepare a Proposal with Cost Sharing
- Evaluating the Impact of Cost Sharing on Awards

Managing Advances

- Describing the Process Flow Associated with Grants Advances
- Setting Up an Award Advance
- Managing and Utilizing an Award Advance
- Analyzing Award Advance Utilization

Setting Up and Managing Protocols

- Explaining Protocol Management

- Setting Up Protocol Approval Committees
- Defining Protocol Approval Rules
- Creating and Managing Protocols

Closing Out Awards

- Explaining the Award Close Out Process
- Closing Out Awards, Projects, and Award Budgets

Evaluating Award Funding in Accordance with Government Regulations

- Identifying Grants Reports
- Creating Federal Financial Reports
- Creating a Continuation Proposal

Setting Up and Using the Grants Portal

- Describing the Grants Portal
- Setting up the Grants Portal
- Granting access to the Grants Portal
- Loading data to the Grants Portal
- Viewing data using the Grants Portal

Schedule (as of 1)

Date	Location	
Feb 28, 2022 - Mar 4, 2022	iMVP	Enroll

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