Oracle Fusion Cloud Project Management: Grants Mgmt Fundamentals

Oracle Project Management Cloud

DURATION	MODULES	COURSE CODE
5 Days	**6 Lectures**	**—**

Course Overview

grants setups, and apply your new knowledge to solving security issues you may encounter on the job.

What You Will Learn

Oracle Fusion Project Management: Grants Management Essentials

- Course Objectives 1- 2
- Overview of Oracle Grants Management
- Lesson Objectives
- Grants Management
- Overview of Grant Awards
- Managing Awards from Start to Finish
- Enterprise Project Management Applications that Work as One
- Grants Management Helps Improve Profitability Using Project
- Financial Management
- Users and Security Prerequisites
- Enterprise Structure and Integration Prerequisites
- Organization Setup for Projects Prerequisites
- Project Foundation Prerequisites
- Project Control Prerequisites
- Project Costing Prerequisites
- Project Billing Prerequisites
- Project Templates Prerequisites
- Summary

Configuring Grants Management

- Objectives

- Define Grants Management Foundation Configuration: Setup Tasks and
- Task Lists
- Grants Management Specific Configurations
- Managing Resources
- Managing Internal Resource Organizations
- Managing Resource Organization Members
- Managing Customer Profile Classes
- Practice
- Creating a Grant Customer
- The Trading Community Model
- Customers and Parties
- Managing Customers
- Simplified Customer Upload
- Practice
- Creating Keywords
- Managing Terms and Conditions
- Managing Grants Personnel
- Manage Grant Sponsors
- Merging Sponsor Parties for Awards
- Practice
- Manage Funding Sources
- Manage Institutions
- Define Grants Management Foundation Configuration: Setup Tasks and
- Task Lists
- Grants Management Business Unit Implementation Options
- Creating Awards with Amount Based Invoicing and Revenue Options
- Additional Billing Attributes While Updating Contract for Award
- Creating Award Templates
- Defining Financial Attributes for Award Templates
- Defining Compliance and Personnel Attributes for Award Templates
- Specifying Descriptive Flexfield Values on Award Templates
- Practice
- Manage Project Standard Cost Collection Flexfield: Grants Management
- Creating Audit Types
- Creating Award Purpose Codes
- Creating Award Types
- Creating Institution Contact Official Types
- Creating Grant Reference Types
- Creating Certifications
- Managing Assistance Listing Numbers
- Verifying the Set Assignment
- Summary

Creating and Managing Awards

- Objectives

- Creating and Managing Awards Overview
- Creating an Award
- Using an Award Template
- Quickly Create an Award
- Practice
- Creating an Award on the Manage Awards Page
- Award Financial Information
- Award Close Date for Transaction Processing
- Award Compliance Information
- Award Personnel Information
- Award Project Information
- Award Funding Overview
- Funding an Award
- Multiple Awards and Funding Sources for a Sponsored Project
- Selecting Cost Reimbursable Revenue Method When Submitting
- a Contract for Award
- Validating Awards
- Tips and Best Practices Creating an Award
- Practice
- Updating Award Funding Amount on Contract Lines
- Award Budgeting Overview
- Managing Award Project Budgets
- Awarding Project Budgets
- Tips and Best Practices for Creating the Award Project and Budget
- Practice
- Updating the Award Budget Period Dates
- Validating Date Changes
- Updating Control Budget Periods for Date Changes.
- Reviewing Errors and Other Considerations
- Practice
- Enabling Indirect Cost for Internal Funding Sources
- Indirect Cost
- Importing Awards
- Import Awards Process
- Error Reporting When Importing Award Details
- Import Grants Personnel Process
- Federal Financial Report
- Managing Awards and Award Projects
- Searching for Projects and Balances Reporting in Award Overview
- Award Project Cards
- View Additional Financial Information
- Using Date Categories
- Auditing Award, Award Project, and Award Funding Objects
- Summary

Defining Budgetary Controls for Grants Management

- Objectives
- Performing Budgetary Control and Encumbrance Accounting
- Enabling Budgetary Control: Options
- Implementation Options
- Using the Budgetary Control Filter Example
- Setting Control Budget Filter Options Example
- Determining Transaction Controlling Budgets Example
- Budgetary Control Exceptions
- Enabling Budgetary Control in Business Units
- Enabling Budgetary Control for Business Functions
- Project Accounting
- Demo
- Budget and Forecast Creation Methods
- Integration with Oracle Budgetary Control
- Financial Plan Type and Project Budget Version
- Budgetary Control Configuration for Sponsored Project
- Creating Control Budgets from Project Budgets: Procedure
- Managing Control Budgets
- Control Budget Structure
- Organizational Planning and Budgeting Unified with the Execution of Projects
- Summary

Award Project Transactions

- Objectives
- Performing Budgetary Control
- Performing Budgetary Control on Burden Cost
- Review Funds Reservation
- Procurement Cycle Overview
- Procurement Cycle Step 1
- Procurement Cycle Step 2
- Procurement Cycle Step 3
- Practice
- Performing Encumbrance Accounting on Burden Cost
- Practice
- Viewing Control Budget Impact on Transactions
- Practice
- Overview of Labor Distribution
- Labor Distribution Roles
- Distributing Project Cost Using Award Funding Patterns
- Summary

Using Billing and Revenue

- Objectives

- Overview of Award Project Billing
- Award Billing Model
- Billing Transactions
- How Associated Projects Actual Cost is Calculated
- How Invoices are Generated
- Settings Affecting Invoice Amounts
- How Invoice Lines are Created
- Eligible Billing Transactions
- Unbilled Transactions
- Generating SF270 Forms
- Previewing and Printing Invoices
- Impact of Changing Bill Plan Attributes on Invoice Amounts
- Updating Letter of Credit and Document Numbers on Active Awards
- Viewing Award Sponsor Bill- To Information on Award Details Pages
- Practice
- Invoice Transactions on Hold
- Contract Amendments and Adjusted Invoices
- Invoice Credit Actions
- Overview of Award Revenue Recognition
- Recognizing Revenue for Awards
- How Award Project and Award Contract Revenue Components Work Together
- Project and Contract Revenue Components
- Summary Revenue Amounts
- Impact of Legal Entities and Multiple Contract Line Associations
- Process Contract Revenue
- Process Contract Revenue Tasks
- Revenue Amount Types
- Potential Revenue
- Other Revenue Amounts
- Settings that Affect Revenue Amounts
- Calculating Revenue Steps
- Additional Calculating Revenue Steps
- Calculating Associated Projects Actual Cost
- Generate Revenue Report
- Practice
- Adjusting Revenue Transactions
- Placing a Transaction on Revenue Hold
- Changing the Billable Status of an Expenditure Item
- Retroactively Amending a Contract that Impacts Revenue Recognition
- and Adjusting an Invoice
- Summary