

**GM 1.0 CREATE AND MAINTAIN GRANTS RELATED PROFILES
PEOPLESOFT 8.4**

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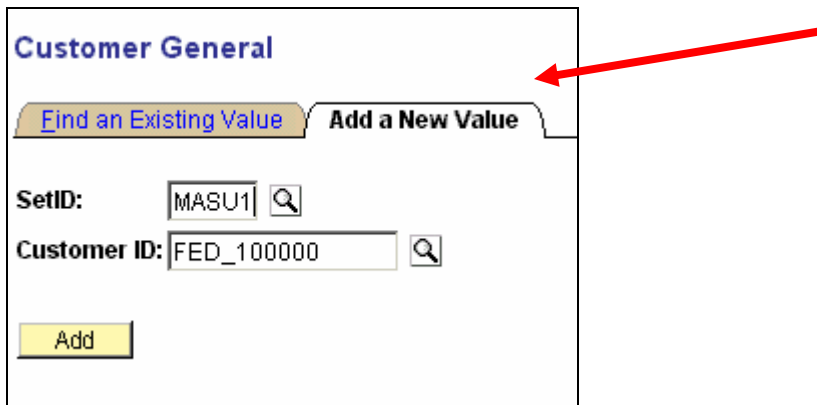
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GM 1.1 Institution Profile

GM 1.2 Sponsor Profile

1. Navigation from the menu, select **Grants > Sponsors > Profile > Add a New Value tab**



The screenshot shows a web form titled "Customer General". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". A red arrow points to the "Add a New Value" tab, which is currently selected. Below the tabs, there are two input fields. The first is labeled "SetID:" and contains the text "MASU1" with a search icon to its right. The second is labeled "Customer ID:" and contains the text "FED_100000" with a search icon to its right. At the bottom left of the form, there is a yellow "Add" button.

2. Enter the **SetID** value. The **SetID** field will be the one established for your institution, "NDSU1, UND01 or MISU1"
3. Next you will enter the Customer ID (Sponsor ID). The Sponsor ID is a 10-position field. The first 3-4 positions define the Sponsor Type followed by an underscore '_'. You cannot have spaces in the sponsor id value so the '_' is used to separate the Sponsor Type from the remainder of the number.

<u>Sponsor Type</u>	<u>Description</u>
COMO	Commodity Sponsor
COMS	Commodity State
FDTN	Foundation
FED	Federal
HLTH	Voluntary Health
INTL	International
NONP	Non-Profit
OGA	Other Governmental Agencies
PHTL	Pharmaceutical
PRIV	Private for Profit
STAT	State

If this is a federal sponsor the next 2 positions of the customer ID are the CFDA summary number. As an example, the Department of Agriculture would be FED_10. To assign the remainder of the number refer to your Sponsor listing. Go to the appropriate agency and select the next number.

If this is a non-federal sponsor reference your Sponsor listing. Go to the appropriate agency and select the next number.

4. Click on the **ADD** button.

General Info Page

General Info		Details	Attributes	Bill To Options	Ship To Options	Sold To Options	Address	
SetID:	MASU1	Sponsor:	FED_100000					
*Customer Status:	Active	Level:	Regular					
*Date Added:	01/22/2003	*Since:	01/01/1901	*Type:	User 1			
*Name 1:	Department of Agriculture			*Short Name:	USDA			
Roles								
<input checked="" type="checkbox"/>	Bill To Customer	<input checked="" type="checkbox"/>	Correspondence Customer					
	Bill To Selection		Correspondence Selection					
<input checked="" type="checkbox"/>	Ship To Customer	<input checked="" type="checkbox"/>	Remit From Customer					
	Ship To Selection		Remit From Selection					
<input checked="" type="checkbox"/>	Sold To Customer	<input checked="" type="checkbox"/>	Corporate Customer					
	Sold To Selection		Corporate Selection					
<input type="checkbox"/>	Broker Customer	<input type="checkbox"/>	Consolidation Customer	Consolidation Business Unit: <input type="text"/>				
<input type="checkbox"/>	Indirect Customer							
<input checked="" type="checkbox"/>	Grants Management Sponsor							
Go to:								...More

5. The **Customer Status** will default to [Active](#).
6. The **Level** will default to [Regular](#).
7. The **Type** will default to [User 1](#).
8. The **Date Added** and **Since** will default to the [Current Date](#). Change both dates to 01/01/1901.

The [Date Added](#) represents the [effective date](#) for the sponsor. To avoid any issues with this date it should always be edited as detailed above.

9. Enter the sponsor's primary name in **Name 1**.
10. The **Short Name** can be completed with a 10-digit short name that is commonly used or it will default as the first 10 digits of the sponsor name.
11. Check the following check boxes in the **Roles** section of this page:
 - a. Bill to Customer
 - b. Ship to Customer

- c. Sold to Customer
- d. Grants Management Sponsor
- e. Correspondence Customer
- f. Remit from Customer
- g. Corporate Customer

NOTE: Grants Management Sponsor must be checked for this sponsor to be available for the enter proposal process and for the F&A to calculate correctly.

Details Page

General Info		Details		Attributes		Bill To Options		Ship To Options		Sgld To Options		Address	
SetID: MASU1		Sponsor: FED_100000											
Level:	<input type="text" value="PRIM"/>	<input type="button" value="Q"/>	Primary Sponsor Level			<input checked="" type="checkbox"/> Federal							
Sponsor Type:	<input type="text" value="FED"/>	<input type="button" value="Q"/>	Federal			<input checked="" type="checkbox"/> US Flag Carrier Required							
Program Type:	<input type="text"/>	<input type="button" value="Q"/>				<input type="checkbox"/> Foreign							
Reports To Sponsor:	<input type="text"/>	<input type="button" value="Q"/>											
CFDA Number:	<input type="text" value="10.000"/>		Cost of Living Increase Pct:	<input type="text"/>									
Sponsor Base:	<input type="text"/>	<input type="button" value="Q"/>											
<input type="checkbox"/> Letter of Credit													

12. The **Level** represents the levels within the sponsor organization with which your institution conducts business. The NDUS levels are **PRIM** = Primary and **DIV** = Division. If this sponsor is a primary sponsor select the primary level and if this sponsor is a division of another funding agency select the division level.
13. The **Sponsor Type** defines the type of sponsor this is. Examples of Sponsor Types are: FDTN = Foundation, FED = Federal. Select the appropriate sponsor type by clicking the magnifying glass.
14. Program Type and Reports To Sponsor are left blank at this time.
15. The Sponsor **Summary CFDA#** will be entered in the **CFDA Number** field. The Cost of Living Increase Pct and the Sponsor Base fields are left blank.
16. If the sponsor is a federal sponsor check the Federal checkbox.
17. The process for identifying the letter of credit information will be covered later in this document.

Attributes

General Info	Details	Attributes	Bill To Options	Ship To Options	Sold To Options	Address	Miscellaneous Ger
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SetID: MASU1 Sponsor: FED_100000

Attributes As Of		Find View All	First	1 of 1	Last
-------------------------	--	-----------------	-------	--------	------

'Effective Date: 03/22/2004 'Status: Active

Attributes Detail		Find View All	First	1 of 1	Last
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'Attribute Code:

'Use From Sponsor: Same As Sponsor Attributes:

'Attribute Value:

Comments:

18. NDUS is using the **Attribute Code** to identify the following: Congressional District, Federal Employee Identification number, Letter of Credit number, DUNS number, Organizational Component Code. If you will be tracking any of these for your sponsor, select the appropriate type. Click the magnifying glass and select the attribute you wish to attach to this sponsor.

19. Once the **Attribute Code** has been selected, enter the appropriate value in the **Attribute Value** field. NOTE: to use the delivered functionality for forms this information must be completed to populate the appropriate values on the forms.

Bill to Options

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General Info	Details	Attributes	Bill To Options	Ship To Options	Sgld To Options	Address
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SetID: MASU1 Sponsor: FED_100000 Department of Agriculture

Customer Bill To Options Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

Responsibilities

Credit Analyst: SCHMIDT Collector: SCHMIDT

Bill Inquiry Phone: Billing Specialist: SCHMIDT Billing Authority:

Billing Options

Direct Invoicing Prompt for Billing Currency

*Freight Bill Type: Shipping Bill Type: GM

Billing Cycle Identifier: Invoice Form: Bill By Identifier: AR Distribution Code:

InterUnit Billing

InterUnit Customer General Ledger Unit:

Billing Consolidation Data

Consolidation Key: Setid: Customer ID:

Purchasing Option

Purchase Order Required

Blanket Purchase Orders

PO Number: Start Date: End Date:

[General Info](#) [Bill To Selection](#) [Payment Options](#) [Write-Off Info](#)

20. **Credit Analyst, Collector and Billing Specialist** are required fields on this page. Your individual institutions have identified values for these fields. Click the magnifying glass next to each field and select the appropriate value.

21. The following Billing Options are required and will be populated in the same manner for all sponsors: **Select Direct Invoicing** by checking the check box, **Freight Bill Type = Shipping** and **Bill Type = GM**.

Ship to Options

General Info	Details	Attributes	Bill To Options	Ship To Options	Sold To Options	Address
SetID: MASU1 Sponsor: FED_100000 Department of Agriculture						
Ship To Customer Options Find View All First 1 of 1 Last						
'Effective Date: 01/22/2003		'Status: Active		+ -		
Ship To Options						
Distribution Network Code: <input type="text"/>		Language Code: English				
Store Number: <input type="text"/>		Single Ship Flag: <input type="text"/>				
Carton Label Format ID: <input type="text"/>		<input type="checkbox"/> Allow Overpick				
Ship Container Label Format ID: <input type="text"/>		Maximum Picking Tolerance: <input type="text"/>				
Just In Time Parameters				Demand Fulfillment Options		
Ship Prior to Request Date: Yes		Partial Schedules: Yes				
Days Allowed After Request Date: <input type="text"/>		Partial Order: Yes				
Number of Days Early: <input type="text"/>		Cancel Backorder: No				

22. All of the values on this page are defaulted. Direct input to this page is not required.

Sold to Options

General Info	Details	Attributes	Bill To Options	Ship To Options	Sold To Options	Address
SetID: MASU1 Sponsor: FED_100000 Department of Agriculture						
Sold To Customer Options Find View All First 1 of 1 Last						
'Effective Date: 01/22/2003		'Status: Active		+ -		
<input checked="" type="checkbox"/> Allow Product Substitutions		Freight Charge Method: <input type="text"/>		Order Number Preference		
<input type="checkbox"/> Restocking Fee		Carton Label Format ID: <input type="text"/>		<input checked="" type="radio"/> System Product ID		
Ship Container Label Format ID: <input type="text"/>				<input type="radio"/> Customer Product ID		
Pricing Options						
Grace Pricing Discount Days: <input type="text"/>		Weight and Volume Price Rule: <input type="text"/>				
Exclusive Pricing ID: <input type="text"/>		Price Rule Code: <input type="text"/>				

20. All of the values on this page are defaulted. Direct input to this page is not required.

Address

General Info		Details		Attributes		Bill To Options		Ship To Options		Sold To Options		Address			
SetID: MASU1		Sponsor: FED_100000		Department of Agriculture											
Address Locations												Find View All		First 1 of 1 Last	
'Location: <input type="text"/>		<input checked="" type="checkbox"/> Bill To		<input checked="" type="checkbox"/> Primary		<input type="checkbox"/> Broker						+ -			
Description: <input type="text"/>		<input checked="" type="checkbox"/> Ship To		<input checked="" type="checkbox"/> Primary		<input type="checkbox"/> Indirect									
		<input checked="" type="checkbox"/> Sold To		<input checked="" type="checkbox"/> Primary		<input checked="" type="checkbox"/> Correspondence Address									
Address Details												Find View All		First 1 of 1 Last	
'Effective Date: 01/01/1901		'Status: Active		Language Code: English								+ -			
Country: USA United States		Tax Code: <input type="text"/>													
Address 1: Dummy															
Address 2: <input type="text"/>															
Address 3: <input type="text"/>															
City: Washington		<input type="checkbox"/> In City Limit													
County: <input type="text"/>		Postal: <input type="text"/>													
State: DC District of Columbia															

21. Check the following check boxes in the Address Locations section of this page: **Bill To, Primary, Ship to, Primary, Sold To, Primary, Correspondence Address**. As you click the Bill To, Ship To, and Sold To boxes the primary boxes will appear and you will check them also.

22. Enter the following required address fields: **Country** (defaults to USA, change if necessary), **Address 1, City, State** and **Postal**. If the country is not USA other fields may be required.

Note: The Bill To address will be used on the Billing Invoice. If there are multiple billing addresses for a sponsor the location and description fields will be used to define the addresses. The location field auto populates sequentially starting with the number 1. The description is user defined. An example would be where a sponsor had an office in the US and an office in France. The description could be "US office" and "Paris office" to designate the two addresses for invoicing purposes. When you establish the bill plan on the contract you would select the appropriate billing address from the magnifying glass for that field. See training process GM 7.X for further contract activation information.

Miscellaneous General Information

SetID: MASU1 **Sponsor:** FED_100000 Department of Agriculture

Web URL: [Website URL](#)

Stock Symbol: [Stock Symbol](#)

Currency Detail

Currency Code: **Rate Type:**

Support Teams [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Support Team Code	Default
<input type="text" value="A-1"/> <input type="text"/>	<input checked="" type="checkbox"/>

23. If the sponsor has a web address you wish to store in PeopleSoft, enter this information in the **Web URL** field. This is not a required field.
24. The following required fields will be populated with the same values for all sponsors: **Currency Code = USD**, **Rate Type = CRRNT** and **Support Team Code = A-1** Click the magnifying glass located by each field and select the appropriate value. Check the default check box located next to the Support Team Code field.
25. Click the Save button on the bottom of the page. This will save the sponsor.

Letter of Credit Information

26. If the sponsor will use the Letter of Credit billing methodology, return to the Detail Tab and check the Letter of Credit check box. Click the save button. A warning message will appear and a new field will open, **Letter of Credit Sponsor**.

General Info		Details		Attributes		Bill To Options		Ship To Options		Sold To Options	
SetID: UND01		Sponsor: FED_10.LOC									
Level:	PRIM	<input type="text"/>	Primary Sponsor Level								
Sponsor Type:	FED	<input type="text"/>	Federal								
Program Type:	<input type="text"/>	<input type="text"/>									
Reports To Sponsor:	<input type="text"/>	<input type="text"/>									
CFDA Number:	10.000	<input type="text"/>	Cost of Living Increase Pct:	<input type="text"/>							
Sponsor Base:	<input type="text"/>	<input type="text"/>									
<input checked="" type="checkbox"/> Letter of Credit	Letter of Credit Sponsor:		FED_10.LOC								

27. Click the OK button on the warning message. Enter the current sponsor ID in the **Letter of Credit Sponsor** field. Depress the Tab button on your keyboard.

General Info		Details		Attributes		Bill To Options		Ship To Options		Sold To Options		Address							
SetID: UND01		Sponsor: FED_10.LOC																	
Level:	PRIM	<input type="text"/>	Primary Sponsor Level	<input type="checkbox"/> Federal															
Sponsor Type:	FED	<input type="text"/>	Federal	<input type="checkbox"/> US Flag Carrier															
Program Type:	<input type="text"/>	<input type="text"/>		<input type="checkbox"/> Foreign															
Reports To Sponsor:	<input type="text"/>	<input type="text"/>																	
CFDA Number:	10.000	<input type="text"/>	Cost of Living Increase Pct:	<input type="text"/>															
Sponsor Base:	<input type="text"/>	<input type="text"/>																	
<input checked="" type="checkbox"/> Letter of Credit	Letter of Credit Sponsor:		FED_10.LOC																
Letter of Credit Info												Find View All		First		1 of 1		Last	
LOC Number:	<input type="text"/>	Comments:	<input type="text"/>																

28. A new section will open, the **Letter of Credit Info** fields. Insert the **LOC Number** in the first field. Enter comments in the **Comments** field. Both fields are required if the LOC information is to be successfully saved. If the sponsor does not have LOC information entered then the Contract cannot be designated as Letter of Credit for the Method of Payment on the Billing Options tab. Also, the contract will not allow LOC

billing since the Method of Payment could not be correctly identified during the contract set up.

GM 1.3 Professional Profile

GM 1.4 Department Profile