



# PeopleSoft Grants Management

## TableSet Sharing Techniques for Multi-Business Unit Organizations

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**Introduction:**

Seldom are PeopleSoft Grants institutional users a one-dimensional organization using a single Business Unit. Most often, Grants are used in complex, multilayered, multi-dimensional Business Unit (BU) organizations. In these circumstances, each BU will require its own configuration and processing rules with grant budgets, budget activities and Facility and Administration (F&A). Inherent in the delivered set-up tables for Record Groups and TableSet sharing, is PeopleSoft’s inability to break-out and create unique rules for individual BU’s.

**Issue:**

During an implementation of PeopleSoft Financials for a mid-Atlantic state in which all agencies and departments would run their financials on a single production PeopleSoft database, issues were encountered when configuring setup among and between agencies, particularly when it came to the Grants suite. This was exaggerated further when we considered the special setup rules Project Costing required when used for construction projects. This also impacted the setup of all spending budgets for tracking in Commitment Control. Nearly every state agency received grant monies in one form or another, which had to be tracked in its own project with a related budget in Commitment Control.

Each state agency was setup in its own BU including the Department of Education (DOE), Department of Health and Human Services (DHHS) and Department of Transportation (DOT). These agencies had their own grant sponsors, F&A rules and project activities in which transactions must be processed. Because TableSet sharing is done by BU, setup for one BU would not work for another. More flexibility was needed to accommodate different rules by department and grant sponsor. This situation is especially problematic with setup items controlled by Record Group GMEG\_04 - Proposal Budget Category. The delivered records within this Record Group are as follows:

**GMEG\_04 - Proposal Budget Category:**

Record Group	Record Name	Record Description
GMEG_04	GM_BUD_CAT1_VW	Budget Category Grants
GMEG_04	GM_BUD_CAT2_VW	Budget Category Resources
GMEG_04	GM_BUD_CATEGORY	Budget Category Control Table
GMEG_04	GM_BUD_CAT_ASET	PM Blank & Asset Rsrc Class
GMEG_04	GM_BUD_CAT_BLNK	PM Blank Rsrc Class
GMEG_04	GM_BUD_CAT_LABR	PM Labor & Blank Rsrc Class
GMEG_04	GM_BUD_CAT_MTRL	PM Blank & Material Rsrc Class
GMEG_04	GM_BUD_CAT_OTHR	PM Blank and Other Rsrc Class
GMEG_04	GM_BUD_CAT_TYPE	Grants Budget Category Type
GMEG_04	GM_FABASE_VW	F&A Bud Categories by Base ID
GMEG_04	GM_FA_BASE_CAT	F&A Base Budget Category
GMEG_04	GM_FA_BASE_DTL	F&A Base Control Table
GMEG_04	GM_OPTY_AC_TBL	[Proposal] Budget Activity Type
GMEG_04	GM_PM_AC_VW	[Proposal] Budget Activity Type

Despite its name “Proposal Budget Category”, this Record group also controls

- Facility & Administration (F&A) information setup for *awards*, and
- Proposal Budget Activity Type, which becomes the project Activity upon award generation.

Further complicating the issue with Record Group GMEG\_04 is that several of the records in this group contain delivered SHARE set-up data that must be used for processing and reporting by all BU’s.

A similar situation exists in Record Group GMEG\_09 – Institution, in which there are records that control the *institutional* rules for F&A that needed to be specific to each BU. Other settings in Record Group GMEG\_09 could be shared across BU's.

More flexibility was needed to accommodate this tangle of rules specific to each department and grant sponsor. Each department needed their own setup rules for processing budgets and F&A. For example, DOE could not be using the same Budget Types or F&A Rate definitions as DOT or DHHS. Neither could DOT use DOE's or DHHS's.

**Solution:**

The solution is to break-out specific controlling records from their delivered Record Groups and set them up in their own, new Record Groups – yes this can be done.

The table below shows the original Record Group, its delivered related tables and the newly created Record Group with the records moved into it:

Original Record Grp	Record Name	Record Description	New Record Grp	Comments
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**Budget Items**

GMEG_04	GM_BUD_CATEGORY	Budget Category Control Table	No change	Budget Items [Category]. This record is also used by PC for budget items.
GMEG_04	GM_BUD_CAT1_VW	Budget Category Grants	No change	
GMEG_04	GM_BUD_CAT2_VW	Budget Category Resources	No change	
GMEG_04	GM_BUD_CAT_ASET	PM Blank & Asset Rsrc Class	No change	
GMEG_04	GM_BUD_CAT_BLNK	PM Blank Rsrc Class	No change	
GMEG_04	GM_BUD_CAT_LABR	PM Labor & Blank Rsrc Class	No change	
GMEG_04	GM_BUD_CAT_MTRL	PM Blank & Material Rsrc Class	No change	
GMEG_04	GM_BUD_CAT_OTHR	PM Blank and Other Rsrc Class	No change	

**Budget Item Types**

GMEG_04	GM_BUD_CAT_TYPE	Grants Budget Category Type	No change	Budget Item Type - must use delivered SHARE setup as these are mapped to reports.
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**Proposal Budget IDs**

GMEG_04	GM_OPTY_AC_TBL	Budget Activity Type	GMEG_99	Budget ID's on the proposal become the project Activity
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Original Record Grp	Record Name	Record Description	New Record Grp	Comments
GMEG_04	GM_PM_AC_VW	Budget Activity Type	GMEG_99	upon award generation. See note below.

**Award F & A**

GMEG_04	GM_FABASE_VW	F&A Bud Categories by Base ID	GMEG_98	
GMEG_04	GM_FA_BASE_CAT	F&A Base Budget Category	GMEG_98	
GMEG_04	GM_FA_BASE_DTL	F&A Base Control Table	GMEG_98	

**Institution F & A**

GMEG_09	GM_IN_FA_RATE	Institution F & A Rate	GMEG_97	
GMEG_09	GM_IN_FA_AGRMT	F & A Rate Agreement	GMEG_97	

A sample TableSet sharing table is shown below. Note that configuration of F&A and budgets can now be done specific to each BU.

	Business Units >	00200 DOT	00800 DOE	00900 DHHS	
Record Group ID	Description	SetID	SetID	SetID	Comments
FS_43	Enterprise Activities	00200	00800	00900	Project Activities
GMEG_02	CFDA Codes Tables	00200	00800	00900	
GMEG_03	Attribute Type Codes	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_04	Proposal Budget Category	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_05	Sponsor Control Data	00200	00800	00900	
GMEG_06	Sponsor Data	00200	00800	00900	
GMEG_07	Departments for Grants	00200	00800	00900	
GMEG_09	Institution	SHARE	SHARE	SHARE	General Institution setup
GMEG_10	Institution Certificates	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_11	Grants Collectors	00200	00800	00900	
GMEG_12	Grants Tree Views	00200	00800	00900	
GMEG_14	Component Types	00200	00800	00900	
GMEG_15	Proposal Keywords	00200	00800	00900	

GMEG_16	Proposal Resource Types	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_17	Sponsor Budget Category	00200	00800	00900	
GMEG_18	Suppliers - Grants Sub-recipient	00200	00800	00900	
GMEG_19	Milestones	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_20	Proposal Guidelines	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_21	Institution/Audit Types	SHARE	SHARE	SHARE	Contains delivered system data in SHARE
GMEG_22	F and A Types and Rates	00200	00800	00900	
GMEG_23	Grants Protocol Management	SHARE	SHARE	SHARE	
GMEG_24	Organization Types	00200	00800	00900	
GMEG_25	Grants Portal	SHARE	SHARE	SHARE	
GMEG_97	Institution F&A	00200	00800	00900	New Record Group, controls specific to BU
GMEG_98	Award F&A	00200	00800	00900	New Record Group, controls specific to BU
GMEG_99	Proposal Budget ID's	00200	00800	00900	New Record Group, controls specific to BU

**Important items to note –**

- [Proposal] Budget Activity Type should be setup in parallel, one-for-one, with Activities set-up for Project Costing (controlled by Record Group FS\_43).
- Set-up any new Grants Record Group, GMEG\_xx, starting with GMEG\_99 and work downward, for example GMEG\_98, GMEG\_97, etc. This allows for any new GMEG Record groups that PeopleSoft may come out with such as GMEG\_26 or \_27, etc. and not overwrite your new ones.
- This reconfiguration of Record Groups does not migrate during upgrades. Be sure to check all of your new set-up as part of an upgrade and re-do this setup manually.

**Conclusion:**

This design has been used with great success and continues to work exceptionally well for this State government. Using this targeted BU setup reduces transaction errors and resulting in more time to analyze and interpret data.

It is a little-known fact, and even less practiced, that delivered RecordGroups can be split into their own groups. This design creates flexibility for configuring specific values particular to a Business Unit. Not only does this allow the freedom to create set-up values per BU, but **not** sharing these values among BU's will eliminate confusion for users who could select invalid prompt values that may be inappropriate for their particular grant or transaction.

About the author:

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