Quantum Information Management

Training Document - Data migration

Project, Award and Contract Data Validation

Document Control

Version History

Version	Final/Draft	Release date	Author	Comments
1.0	Draft	25-May-2022	Infosys	

Reviewer Details

Name	Review Date	Comments

1. Table of Contents

2. Validate Project Creation 6
1.1 Basic Project Details validation 10
2.1 Validate Project Currency 11
2.2 Validate Additional Information 11
2.3 Validate Tasks (Work Breakdown Structure) 13
2.4 Validate Planned start Date and End Date 13
2.5 Validate Responsible Party 14
2.6 Validate Organization on Tasks 14
2.7 Validate Resource Assignment in Project Plan 15
2.8 Period Amount to resource added on task 15
2.9 Validate Project Financial Plan 16
2.10 Validate Project Manager and Team Members to the Project 16
3. Award Creation Validation 18
3.1 Validate Converted Award 19
3.2 Validate Award Details 19
3.3 Validate Fund code 20
3.4 Validation Burden schedule, Budget Period, Internal funding and Personnel 21
3.5 Step 2: Validate Budget Period 21
3.6 Validate Funding Sources 22
3.7 Validate Award Personnel 22
3.8 Validate Associated Projects with the Award 23
3.9 Validate Funding 23
3.10 Validate Budgets 24
3.11 Validate Award Budget Task Name, Task Number and Resource Name 25
3.12 Validate Funding source on task 26
3.13 Validate Budget amount 26
3.14 Validate the responsible party 28
4. Validate Award Contract created (Limited access and is managed by GSSC Team) 29
4.1 Validate Contract details 30
4.2 Review Funding Amount at Contract 32
4.3 Validate Cost centre 33
4.4 Validate Project associated to the contract 33
4.5 Validate Deliverables 33

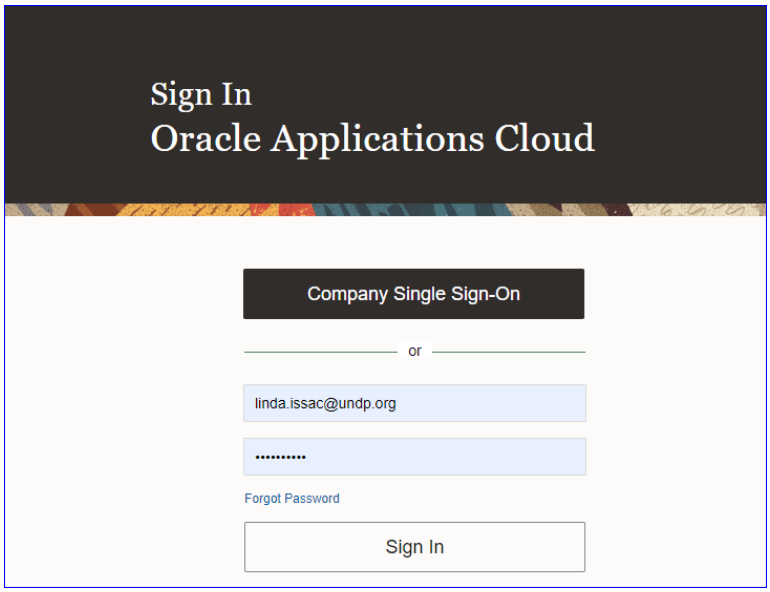
4.6 Validate Billing Details 34

Quantum Application Access

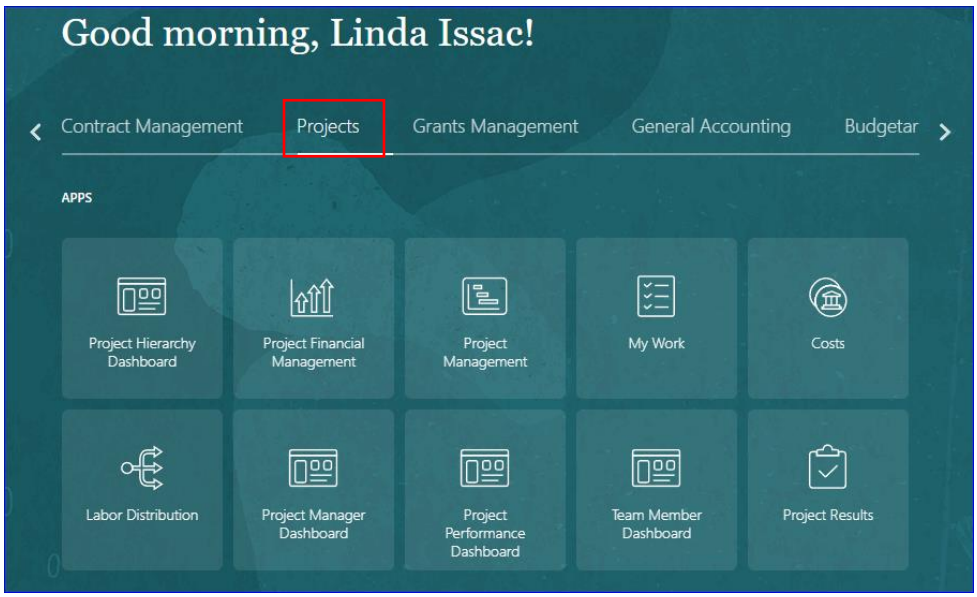
PPM Quantum URL:

Step1: Login as Project Manager/Or any another Business profile which give access to access Project.

Click on the URL above and login with your credentials to get started with your Project related activities.



Please click on Project tab and PPM Application Home page will look as shown in below figure: -



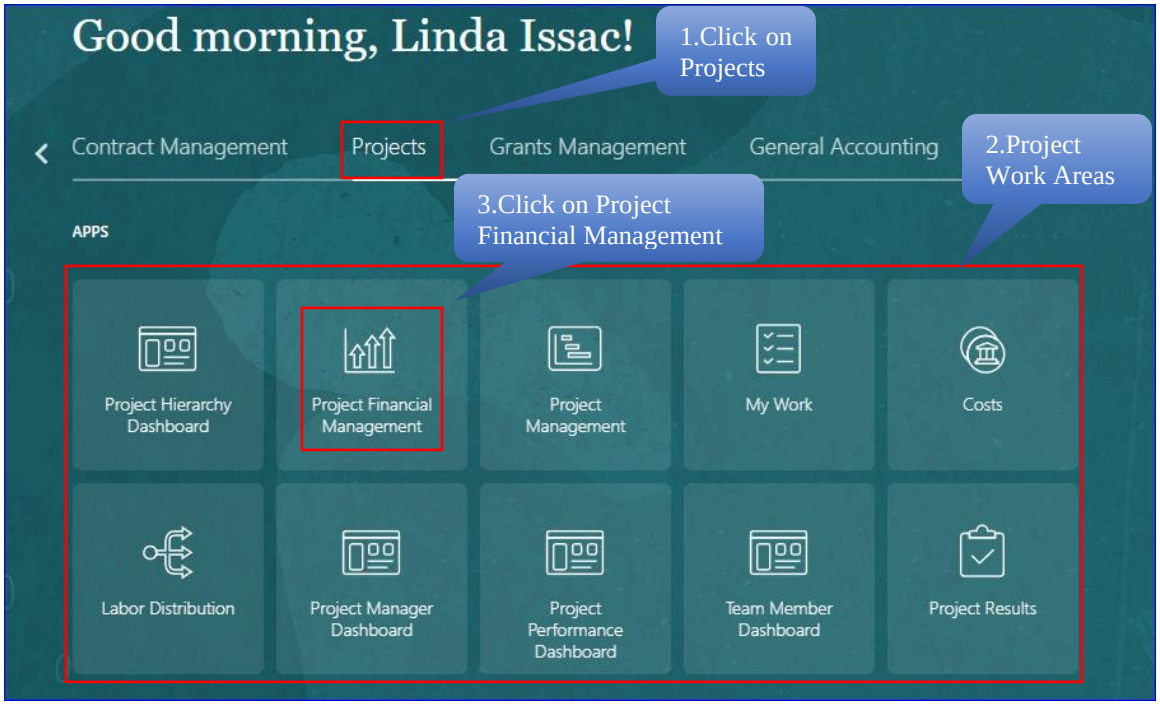
2. Validate Project Creation

Converted Projects can be viewed in 'Project Financial Management' work area in the application.

Navigate to '***Project Financial Management***' Work area.

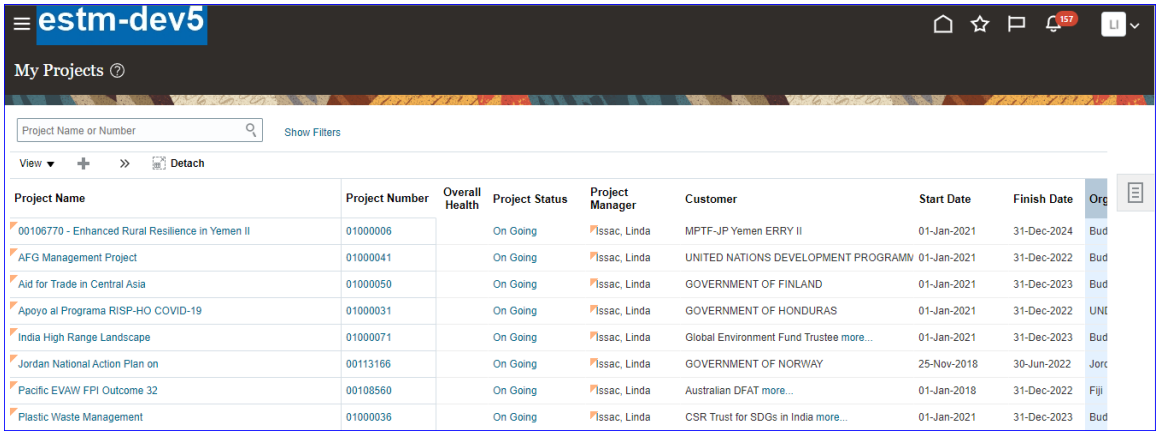
From your PPM Application Home page,

1. Click on Projects
2. Work areas available under Projects are shown
3. Click on Project Financial Management



Step 1- Query the Project from My Project Screen

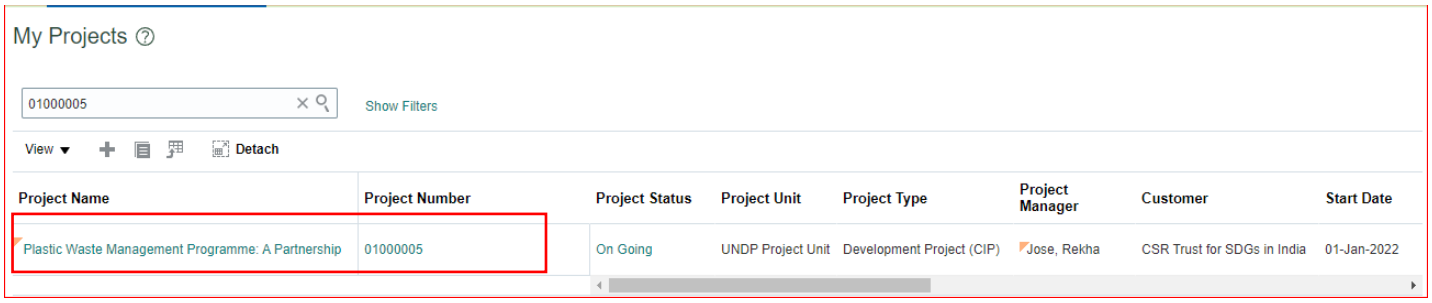
'My Projects' screen is opened in your Project work area



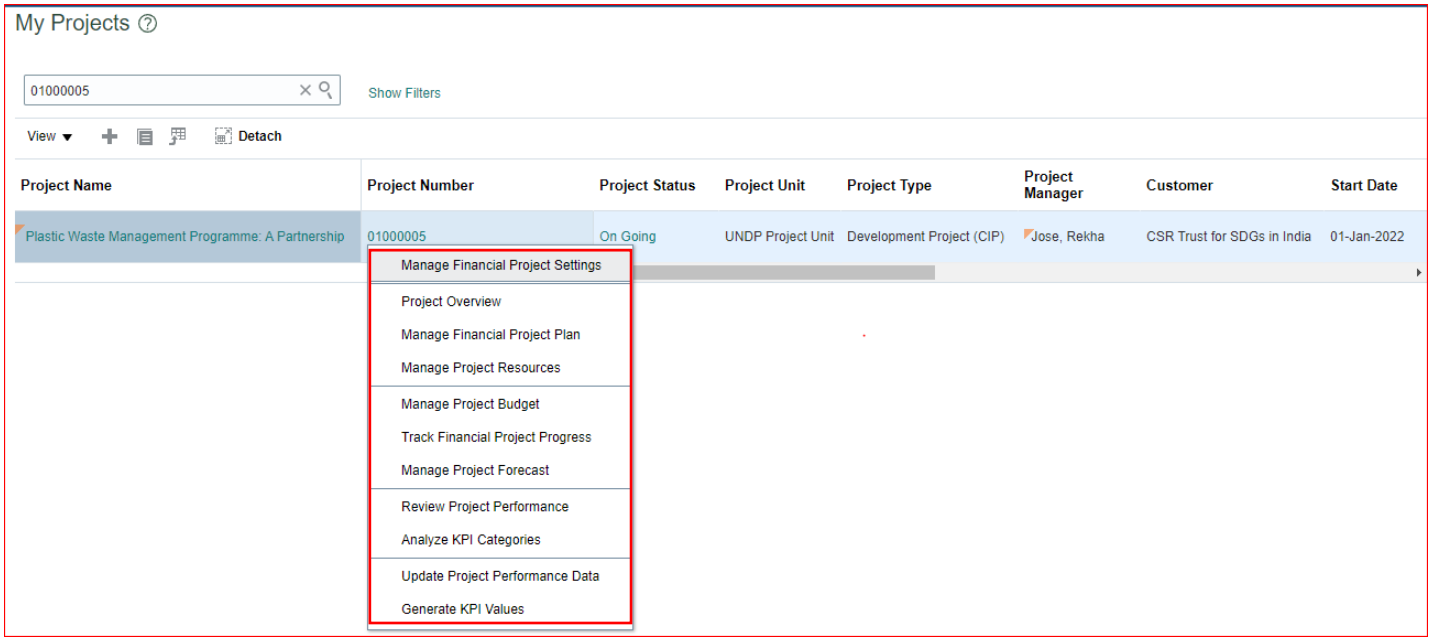
Query the Project.

Step 2- It can be achieved in two ways a) Clicking on My Projects or b) Clicking on Open Projects link

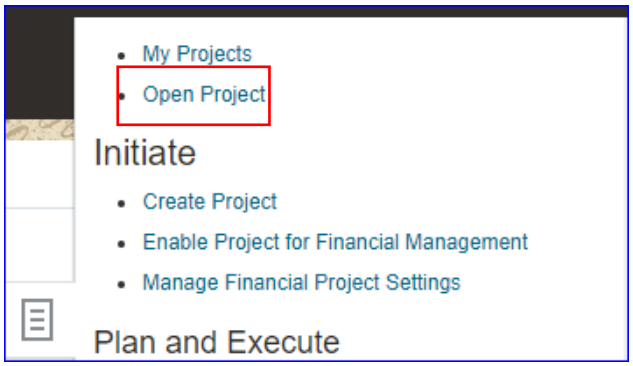
a) **If clicking on My Projects**- Locate the newly created project appearing on the Search Results

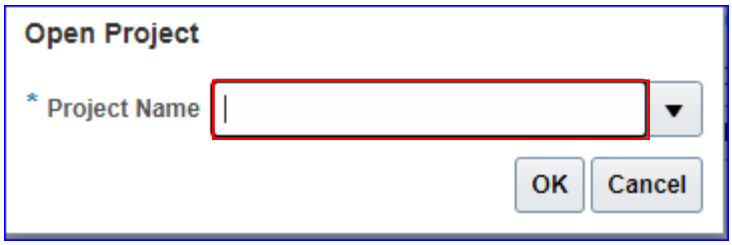


Click on the 'Project Name' or 'Project Number' to open the Project Task Bar and choose Manage Financial Project settings to open the Project details and Review



b) If searching for the project from the Open Projects option - Search with the Project Name you created, and this will directly take you to the Manage Financial Project settings page to Review Project details



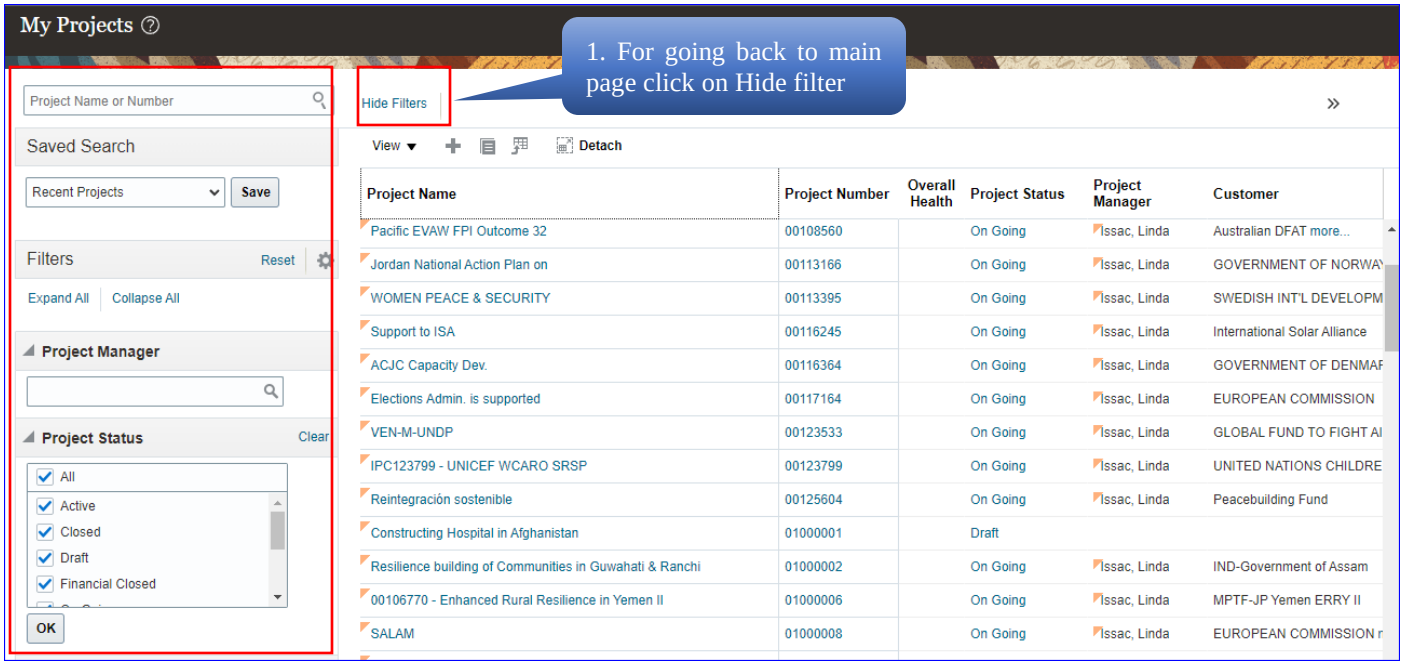


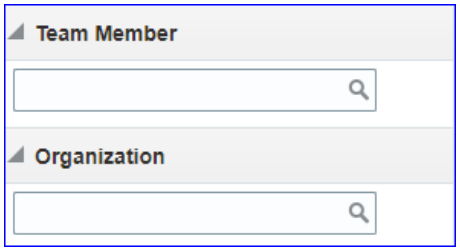
If the Project created is not listed, you can search with additional filters as below:

Click on 'Show Filter', select various options and click on *Search*

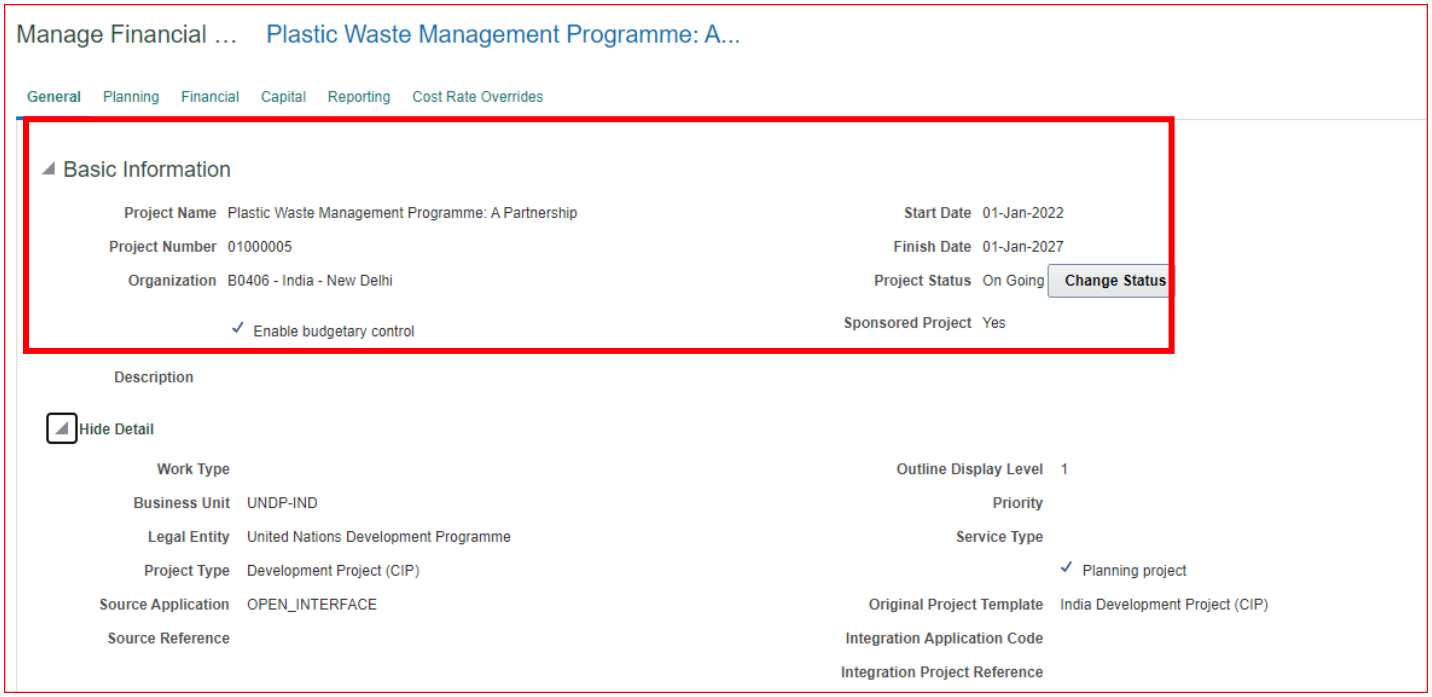
Search option are:-

- Project Name
- Project Number
- Project Manager
- Project Status
- Team Member
- Organization





By clicking the project in the project listing , project header information is displayed



1.1 Basic Project Details validation

Following Project Basic information can be validated in 'Manage Financial Project Settings'

General Tab -

Project Name, Project Description, Organization

Financial Tab -

Project Currency

Additional Tab -

Additional Information: - e.g. Implementing Partner, Implementing Modality and other attributes

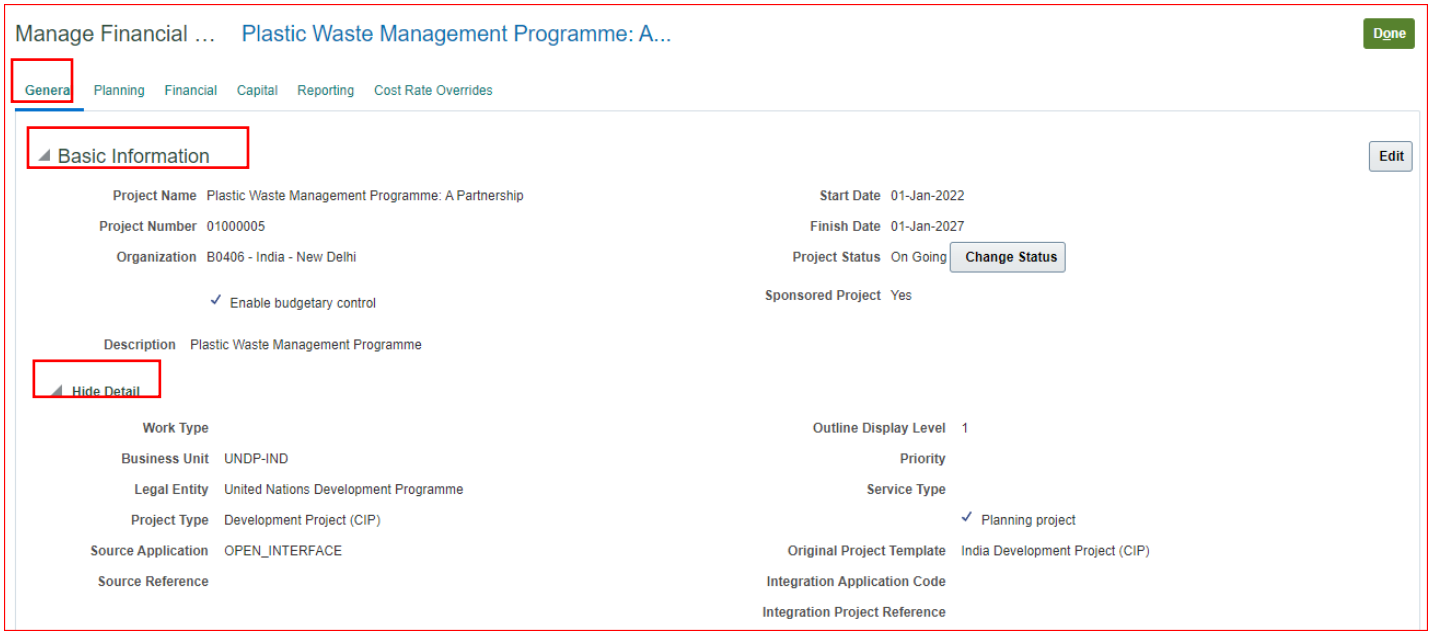
Navigate to 'Manage Financial Project Settings' Work area.

From your PPM Application Home page,

Projects ➔ Project Financial Management➔ Search for Project ➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Settings

In 'General' tab,

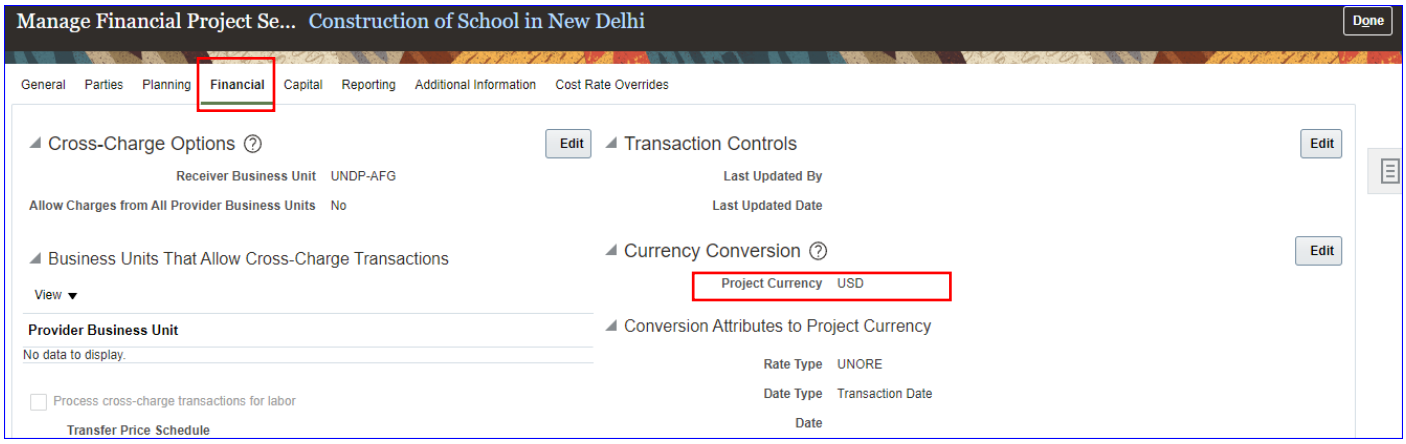
Step 1: Validate Project Name, Project Number, Organization, Start Date, Finished Date, Descriptions, Business Unit, Legal Entity, Project type



Financial Tab

2.1 Validate Project Currency

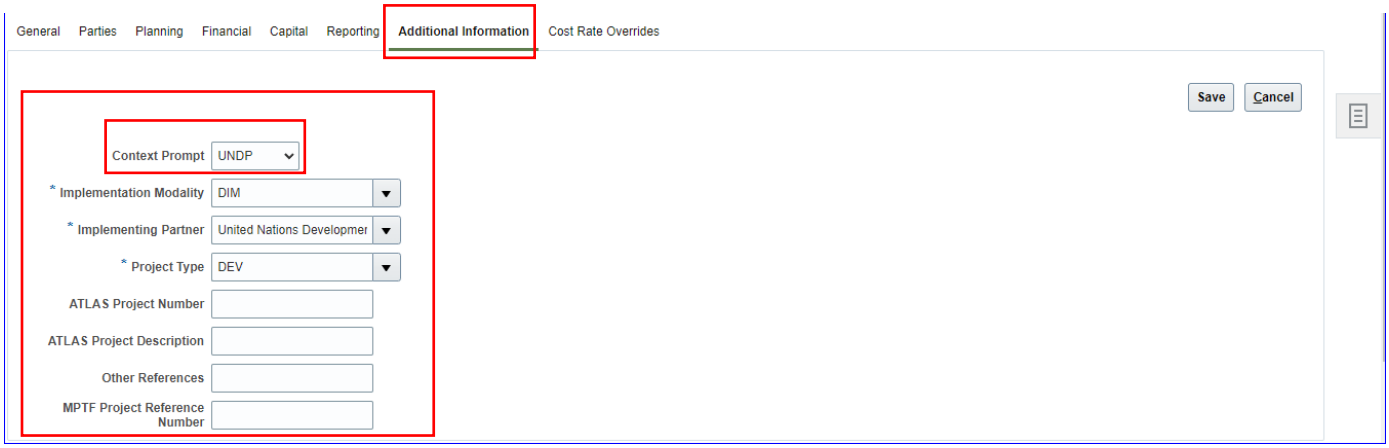
Navigation- Project ➔ Task Bar ➔ Manage Financial Project settings ➔Financials ➔ Currency Conversion➔ USD



2.2 Validate Additional Information

Validate Additional Information

Navigation- Project ➔ Task Bar ➔ Manage Financial Project settings ➔Additional Information



Manage Financial Project Plan

On the converted Projects from Atlas, you would want to validate data below mentioned Update current Project planning period

- Validate Task Name and Number
- Validate Start and Finished date of task
- Validate Additional Information- Responsible Party
- Validate service type on task
- Validate organization on task
- Validate Resource Assignment in Project Plan
- Validate period amount
- Validate Project Financial Plan

From your PPM Application Home page,

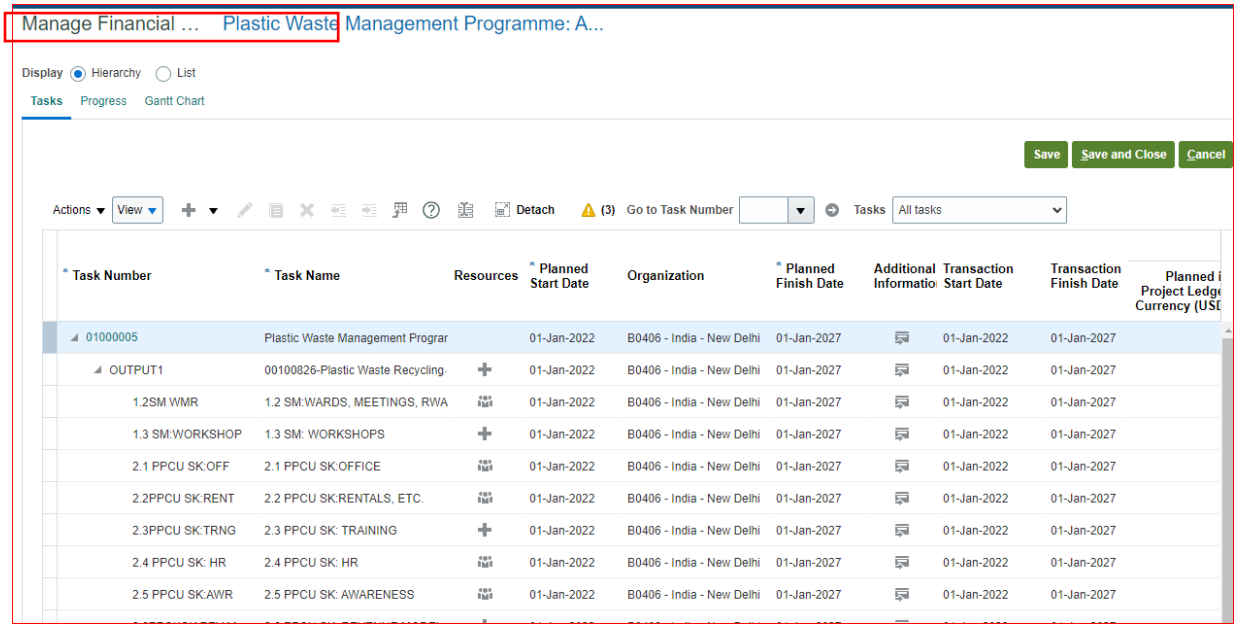
Navigate to 'Project Financial Management' Work area.

From your EPPM Application Home page,

1. Click on Projects
2. Work areas available under Projects are shown
3. Click on Project Financial Management

Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Plan

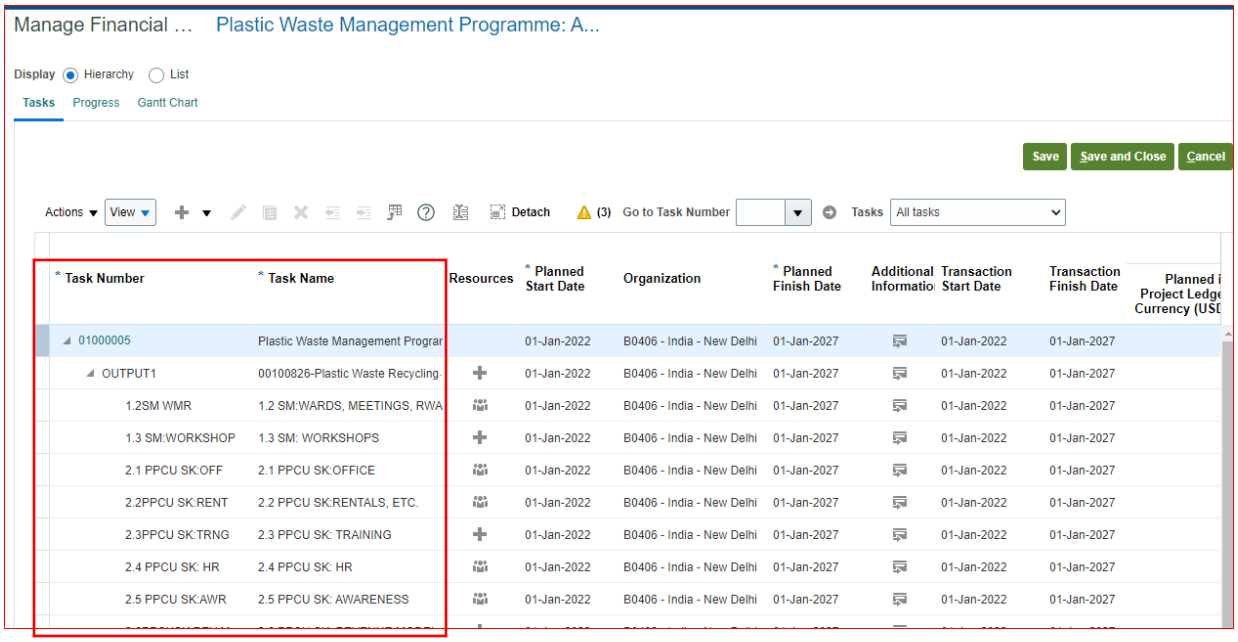
Project Plan screen is opened



2.3 Validate Tasks (Work Breakdown Structure)

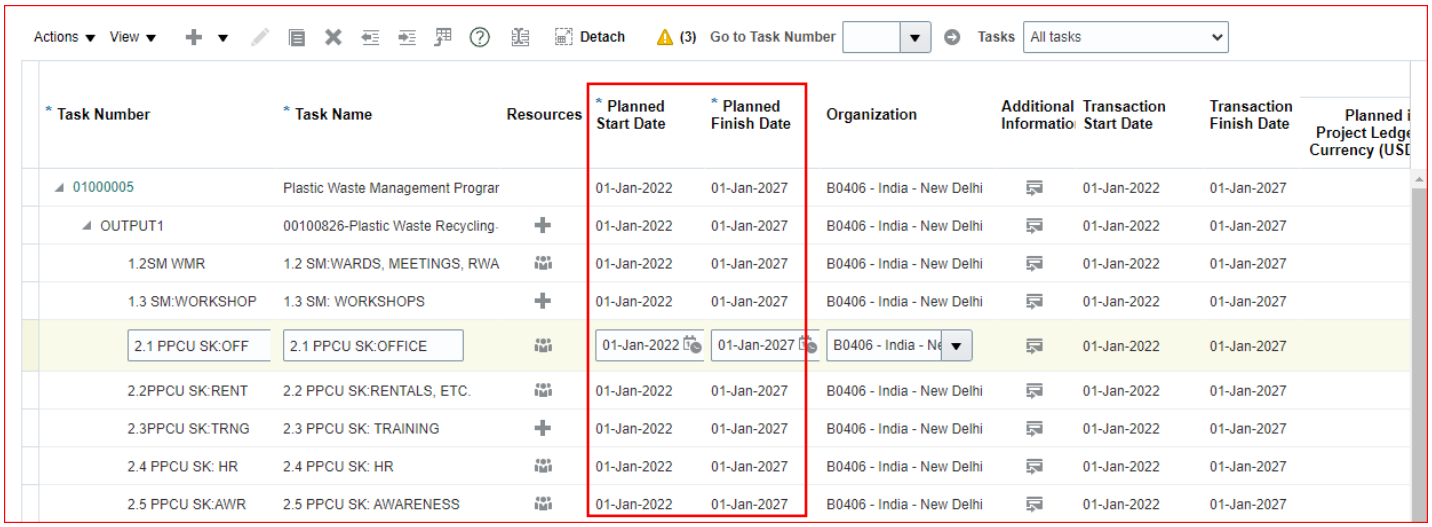
Validate all Task name and number from Atlas

Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Plan➔ View ➔ Expand all below ➔



2.4 Validate Planned start Date and End Date

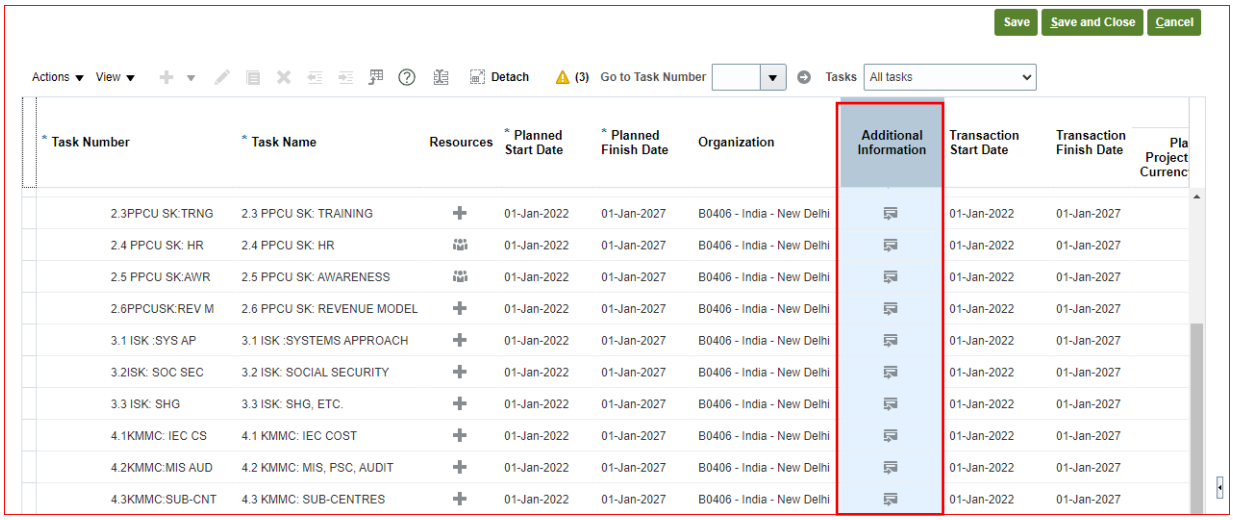
Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Plan➔ View ➔ Expand all below ➔Planned start date & Planned Finished date



2.5 Validate Responsible Party

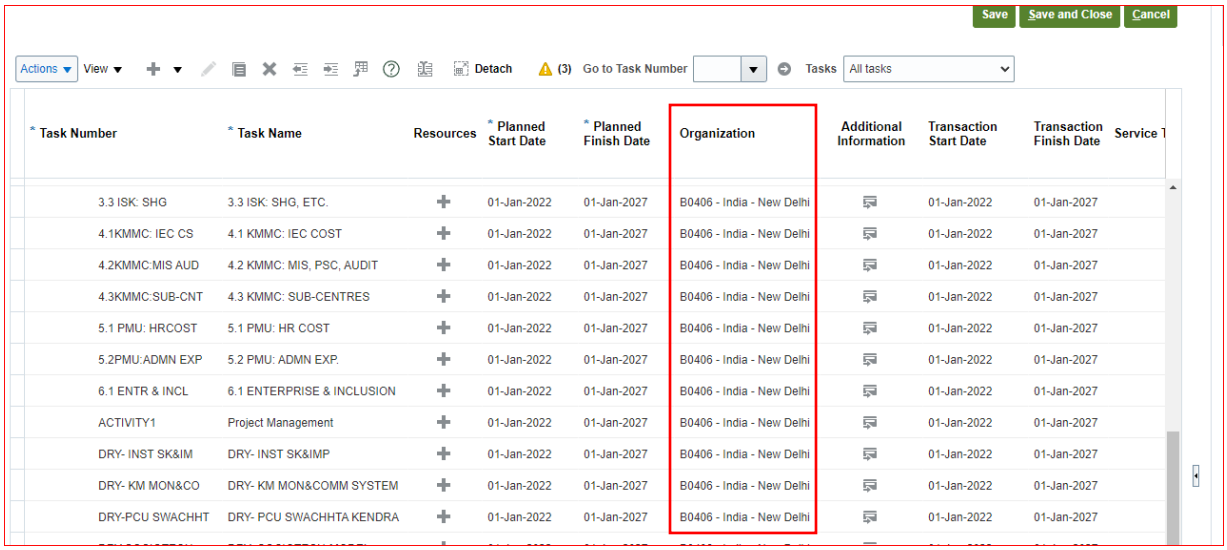
View Responsible Party in additional Information

Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Plan➔ View ➔ Expand all below ➔Activity level ➔Additional Information



2.6 Validate Organization on Tasks

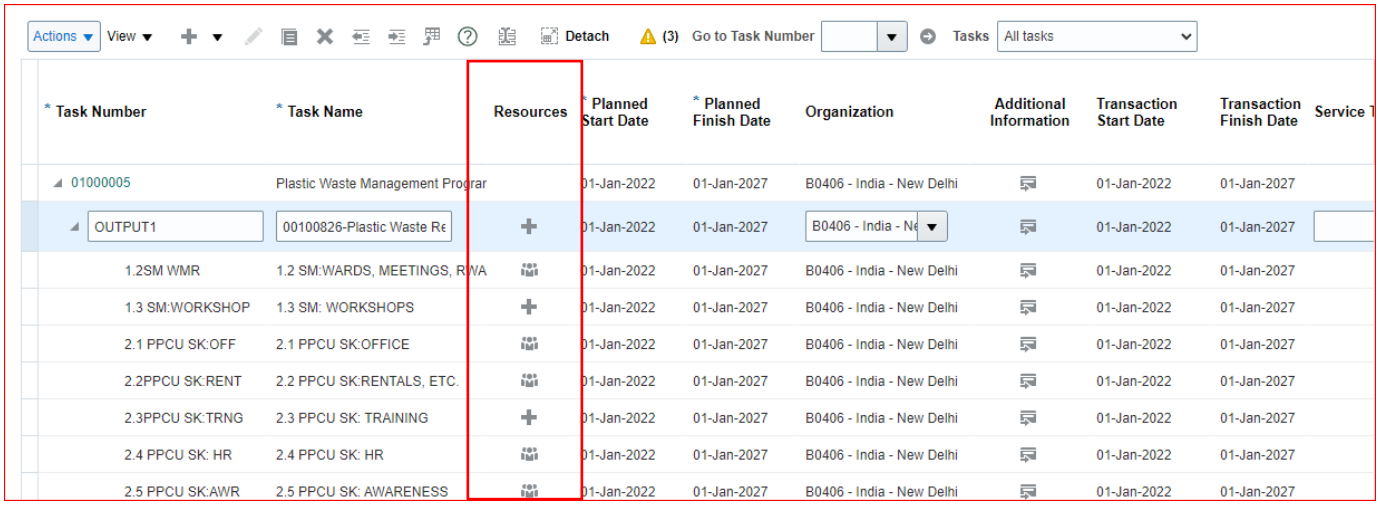
Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Financial Project Plan➔ View ➔ Expand all below ➔Organization



2.7 Validate Resource Assignment in Project Plan

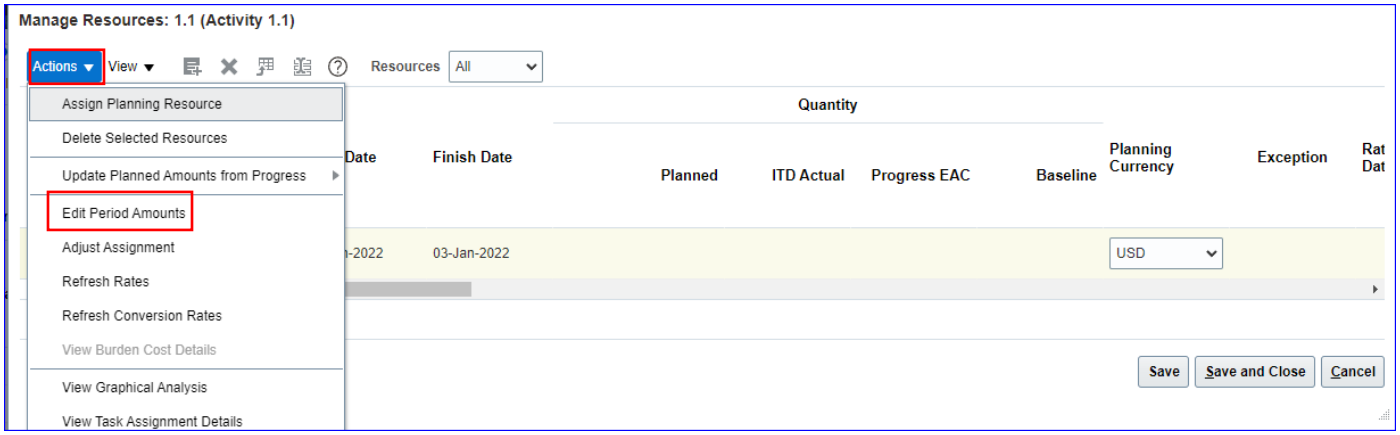
Follow instructions in below figure to open Planning Resource Assignment screen

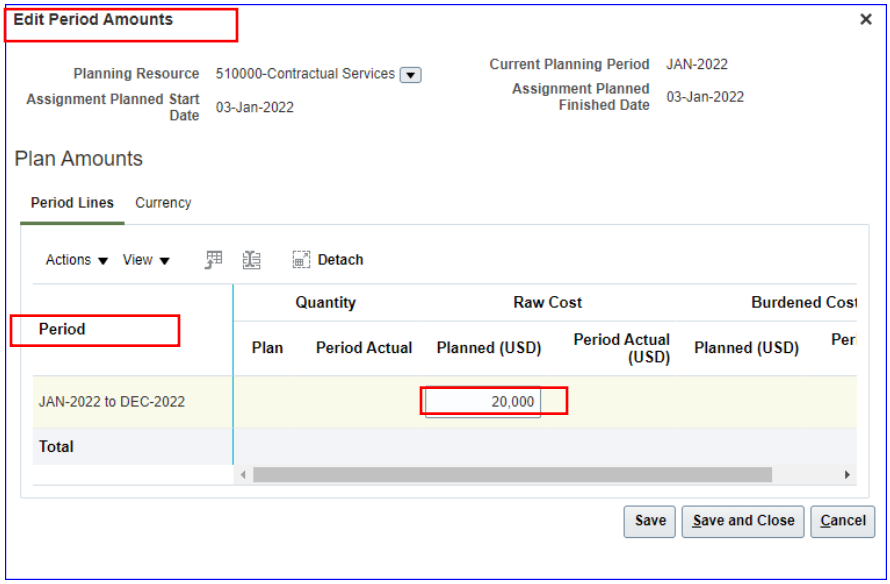
Navigation ➔ Project ➔ Task Bar ➔ Manage Financial Project Plan ➔view ➔Expand all below ➔ Activity ➔ Resources



2.8 Period Amount to resource added on task

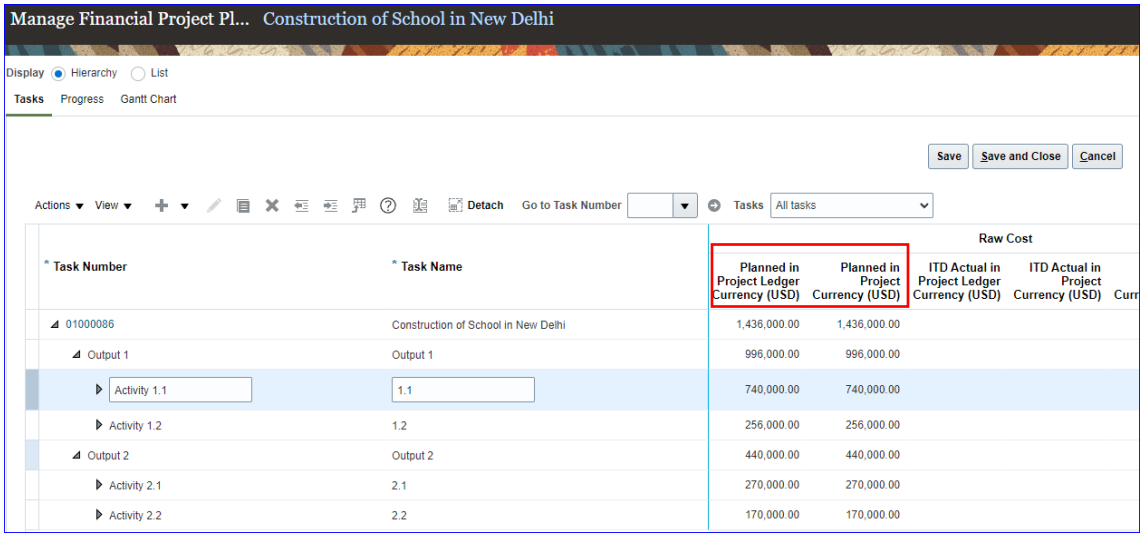
Navigation ➔ Project ➔ Task Bar ➔ Manage Financial Project Plan ➔ ➔view ➔Expand all below ➔ Activity ➔ Resources ➔ Click on icon ➔ select Resources ➔ Actions ➔ Edit Period Amount





2.9 Validate Project Financial Plan

After resource planning at task or budget planning at task you can see total financial plan amount

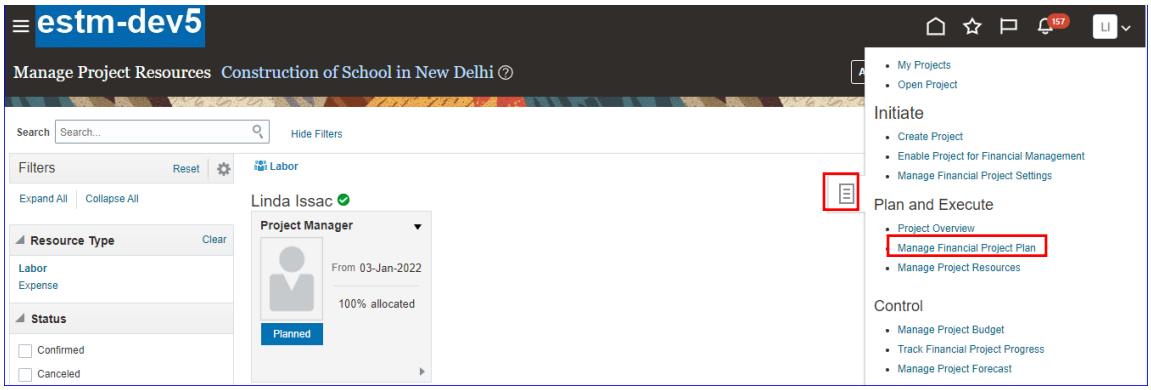


2.10 Validate Project Manager and Team Members to the Project

Navigate to ‘Manage Project Resources’ Work area.

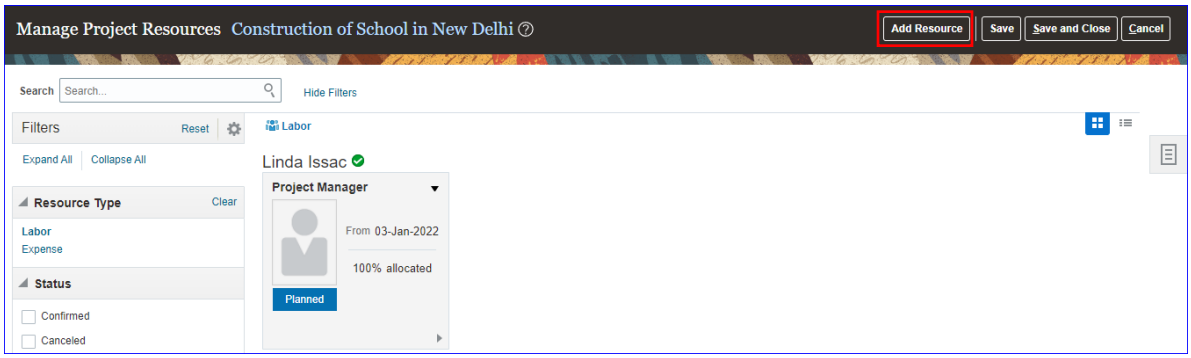
From your PPM Application Home page,

Projects ➔ Project Financial Management➔ Click on Project ➔Task Bar ➔ Click on Manage Project Resources

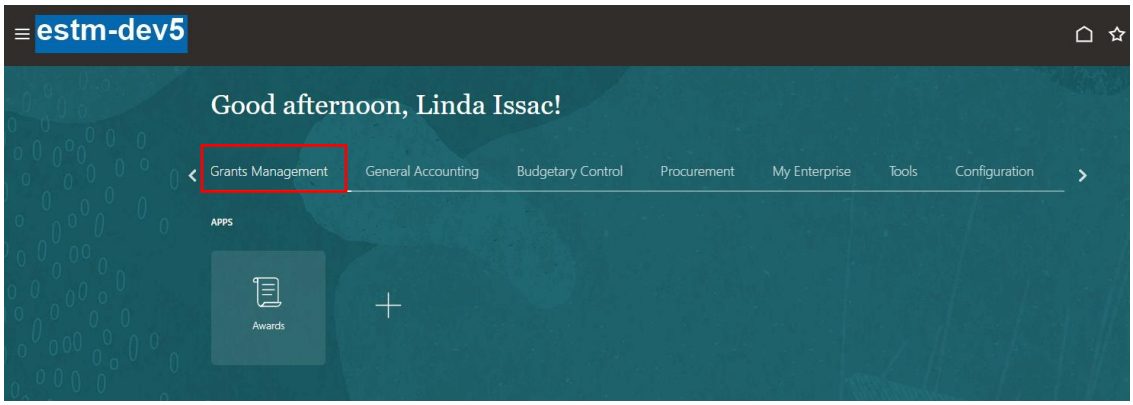


Manage Project Resource page will open

Validate Manager and Team Member to the Project click on Add Resource button and fill the details



3. Award Creation Validation



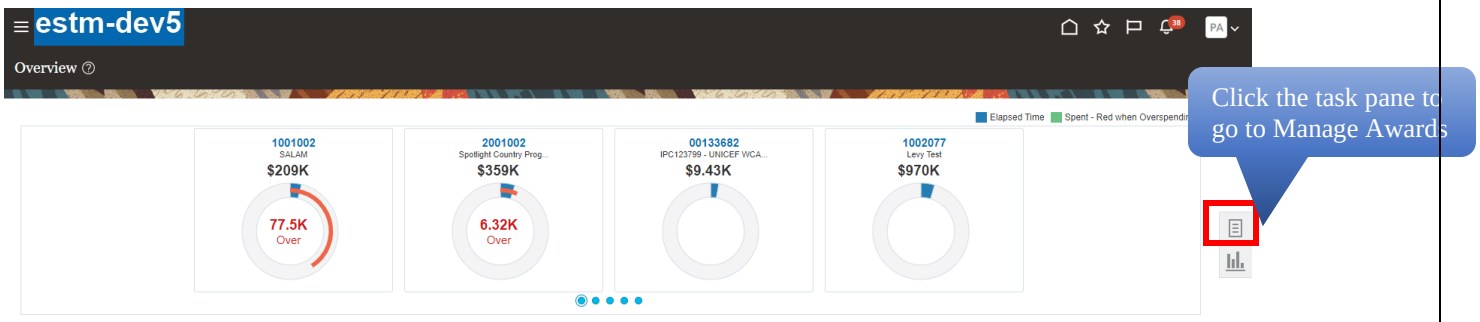
Converted Awards can be viewed in 'Grants Management' work area in Quantum application.

Navigate to '***Grants Management***' Work area.

From Quantum Home page,

4. Click on "Grants Management" tab
5. Work areas available under Grant Management is shown
6. Click on Awards

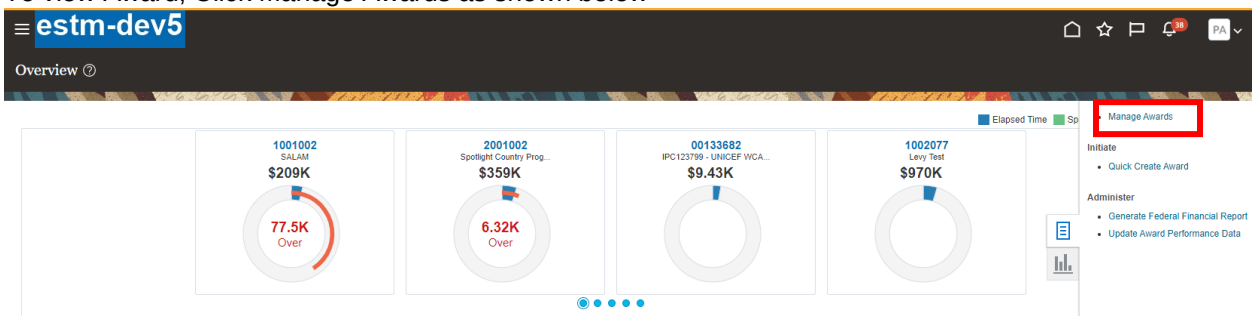
'Awards Overview' page will get opened in your Awards work area below:



Note: *'Overview' page is your Awards home page showing the health of Awards you have access by playing a role on it, like Project Manager, Team Member of Principal Investigator etc. New Award can be viewed by clicking the task pane as highlighted above*

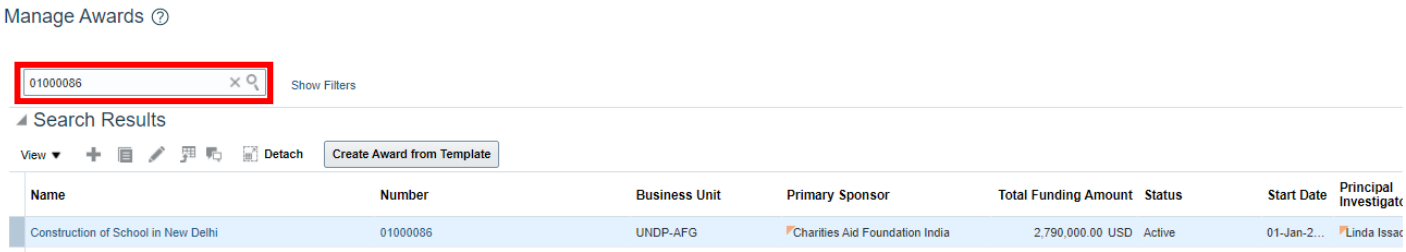
3.1 Validate Converted Award

1. To view Award, Click Manage Awards as shown below



This will take you to the awards screen where all your awards are listed

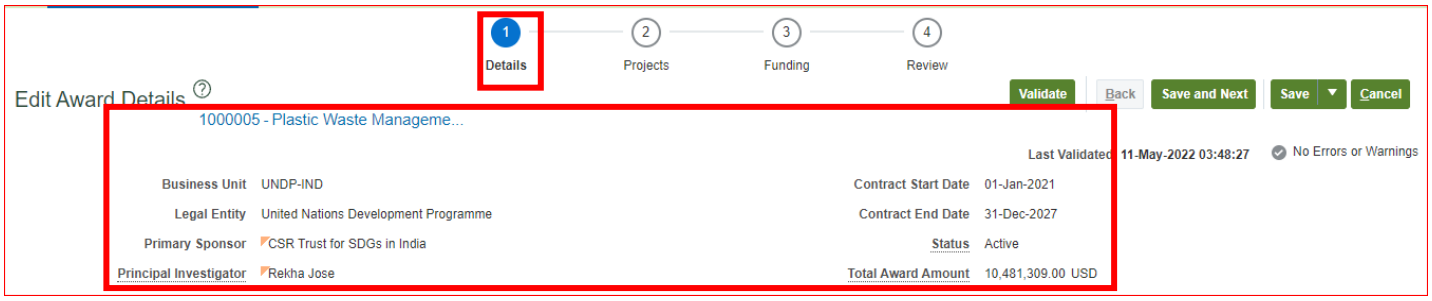
2. Award can be searched by using the search criteria as shown below by using Award Number or Name:



3.2 Validate Award Details

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details

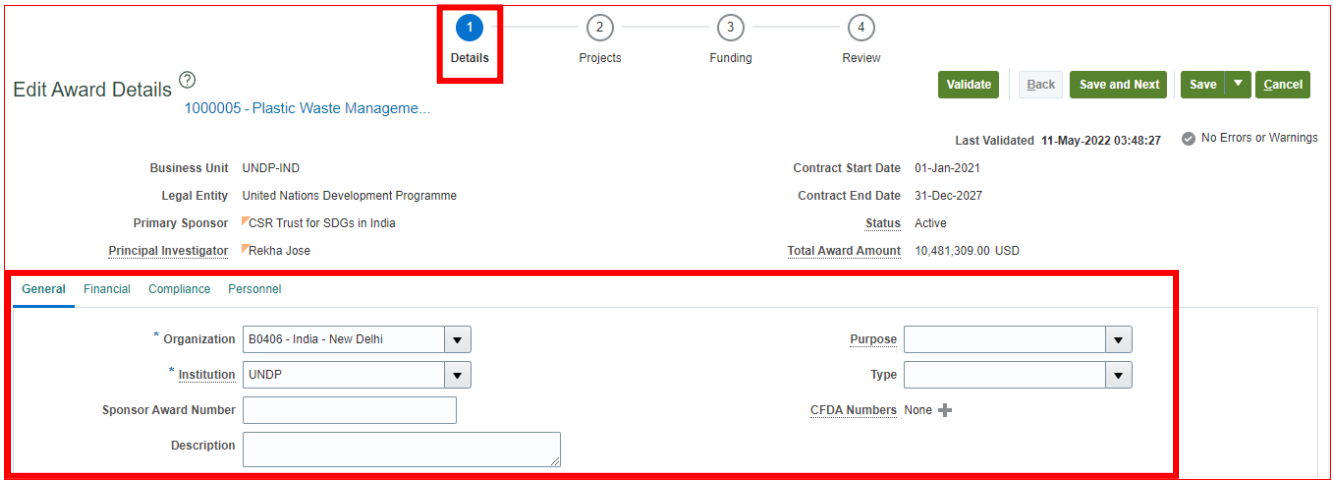
Validate Award Name, Award Number, Business Unit, Legal Entity, Currency, Award Name, Award Number, Principal Investigator, Contract Star and End date, Total Award Amount, Award Status



General Tab-

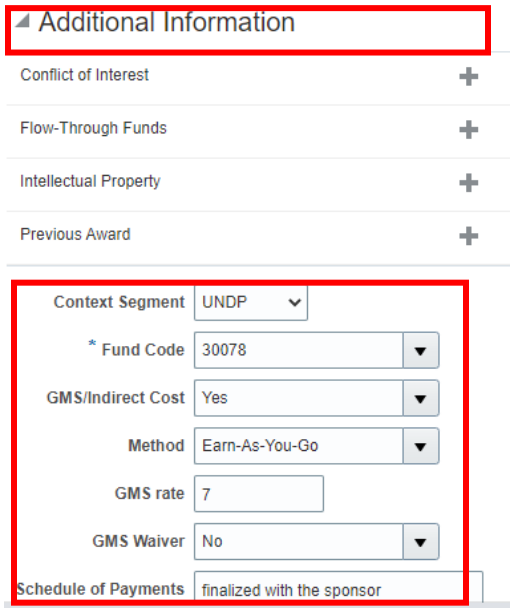
Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details>> General

Validate Organization, Intuition



3.3 Validate Fund code

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details>> General >> Additional Information

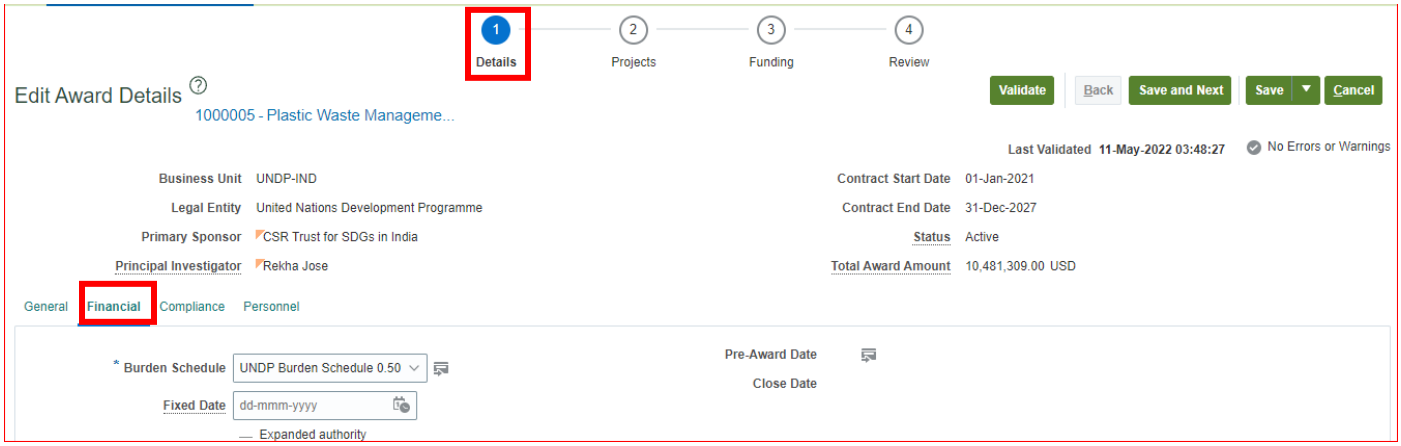


3.4 Validation Burden schedule, Budget Period, Internal funding and Personnel

Step 1: Validate Burden schedule

Click on the Financial tab Validate Burden Schedule

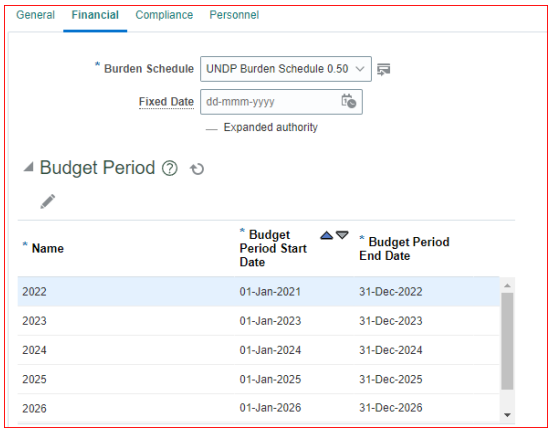
Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details>> Financial >> Burden Schedule



3.5 Step 2: Validate Budget Period

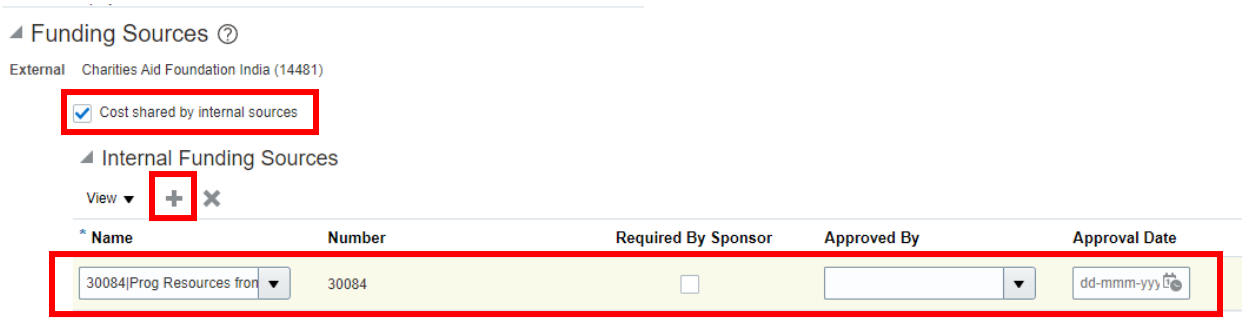
Click on the Financial tab Validate Budget Period

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details>> Financial >> Budget Period



3.6 Validate Funding Sources

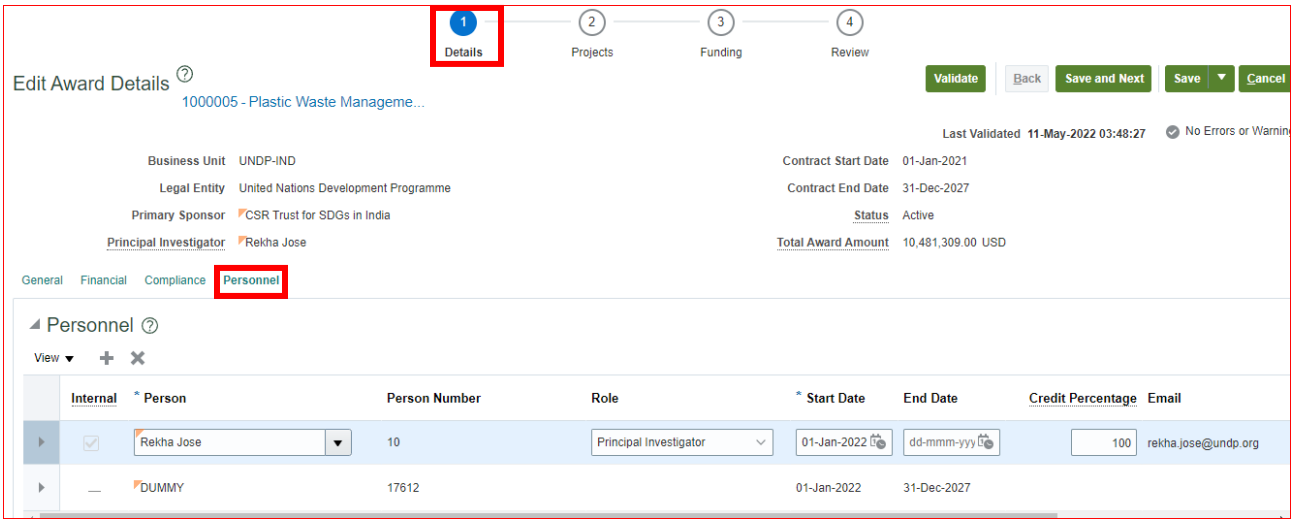
Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Details>> Financial >> Funding Source



3.7 Validate Award Personnel

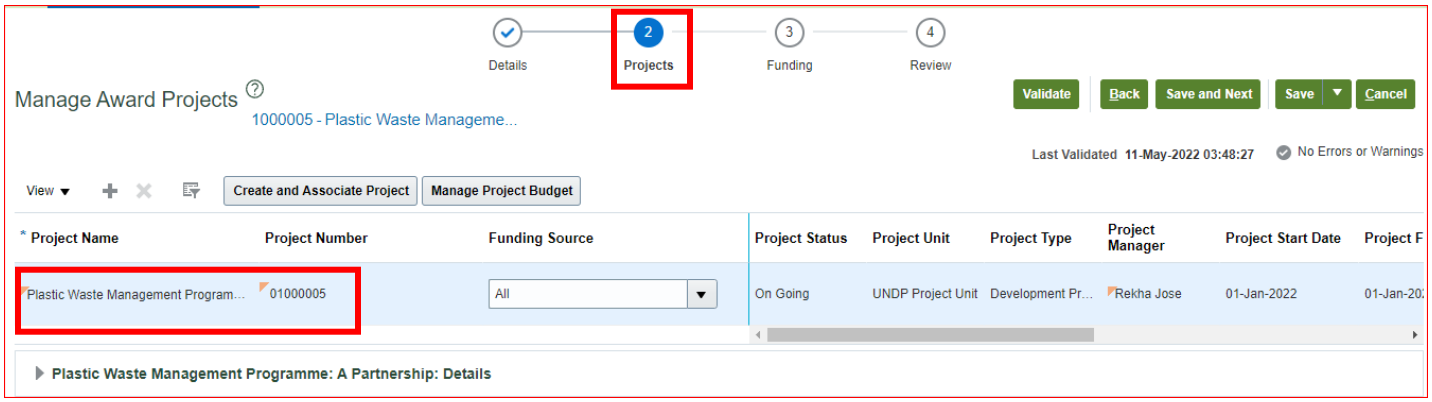
Under the Personnel tab review or the add people associated with award

Note – The compliance tab (before Personnel tab) is not applicable to UN Agencies.



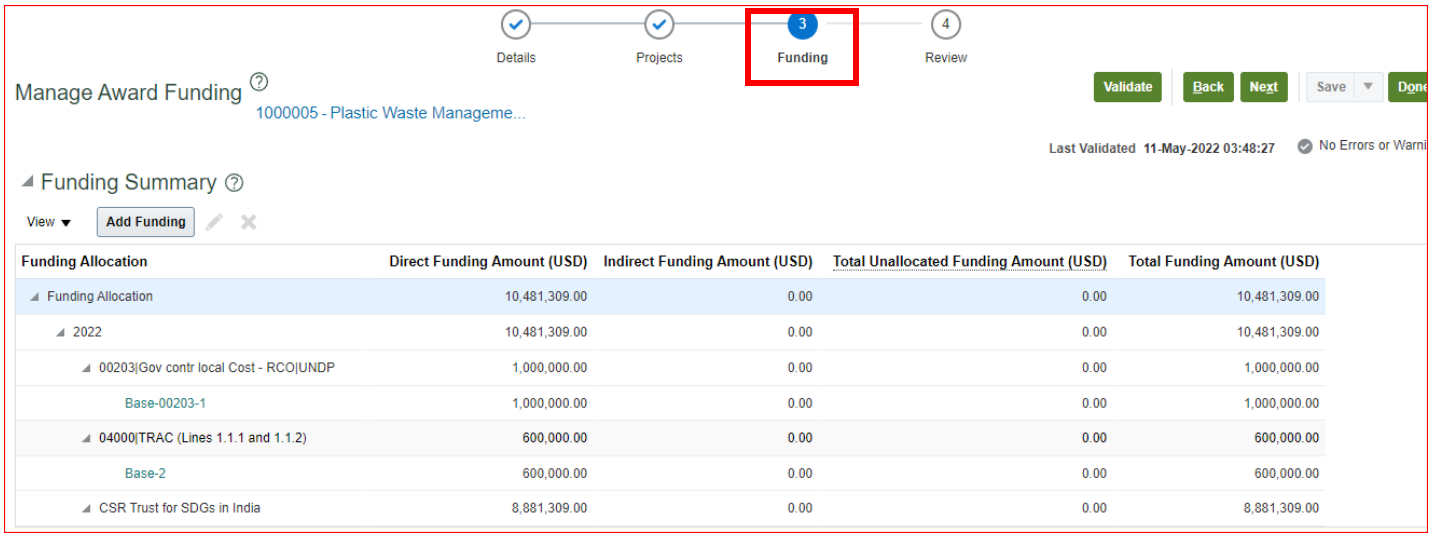
3.8 Validate Associated Projects with the Award

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects>> Manage Award Projects>> Project Name & Number



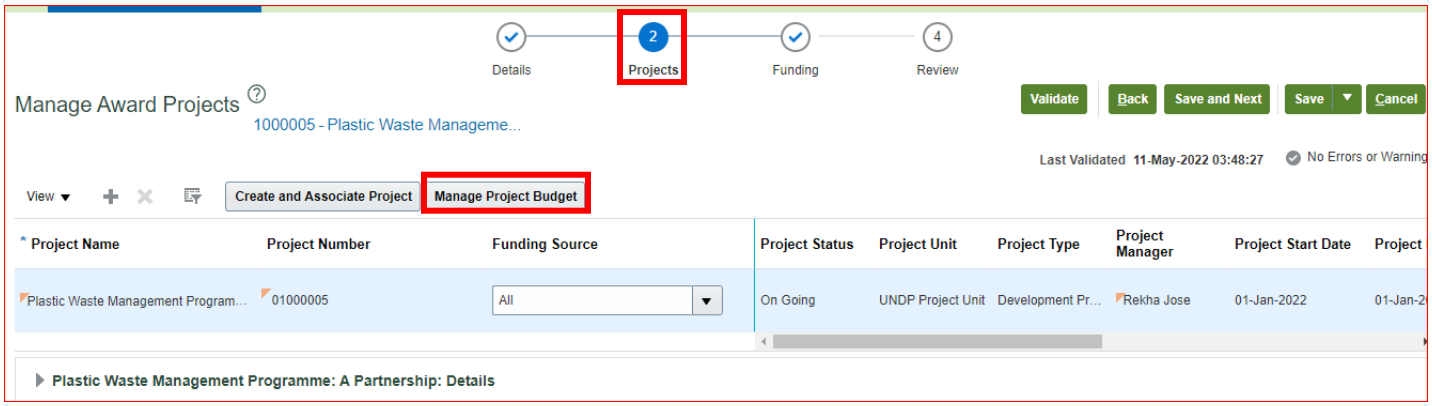
3.9 Validate Funding

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Funding>> Manage Award Fundings

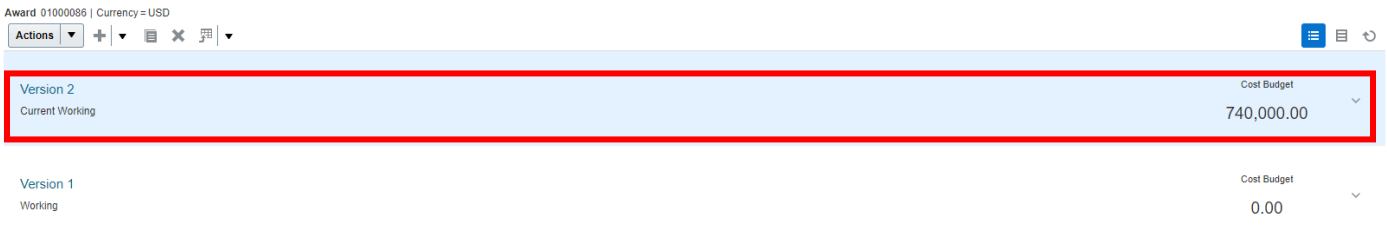


3.10 Validate Budgets

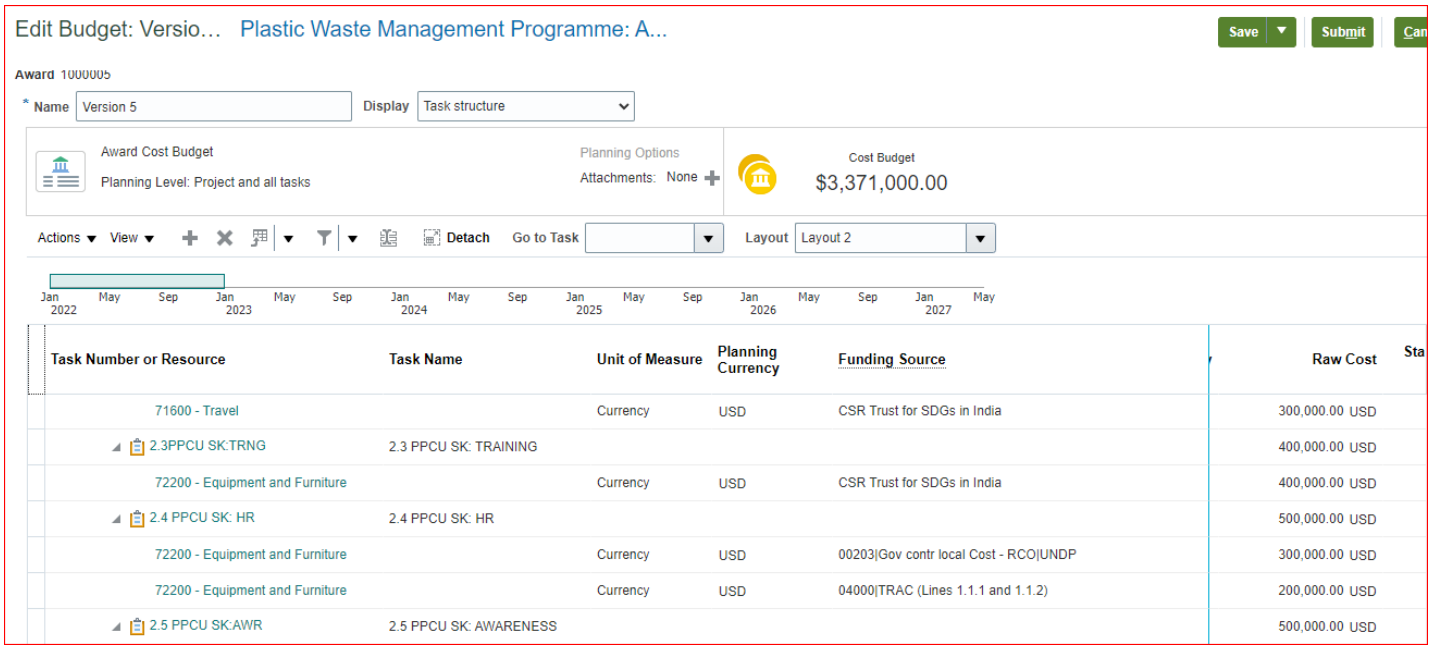
Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects >> Manage Project Budget



Click on Manage Budget Versions page will be displayed.
Open the budgets working area and notice the budget working version copied from project financial plan. Ignore the version 1 in this example.

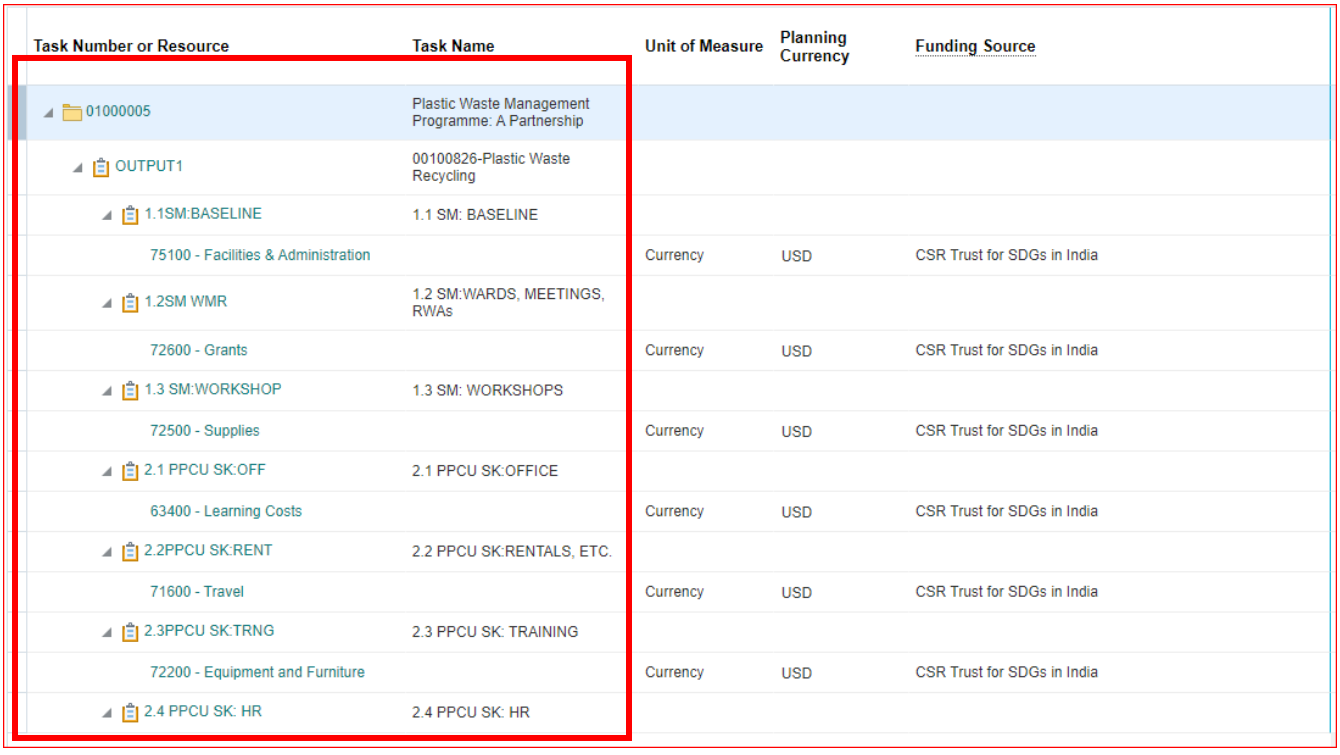


Validate- Task Name, Task Number, Currency, Funding Source, Raw cost



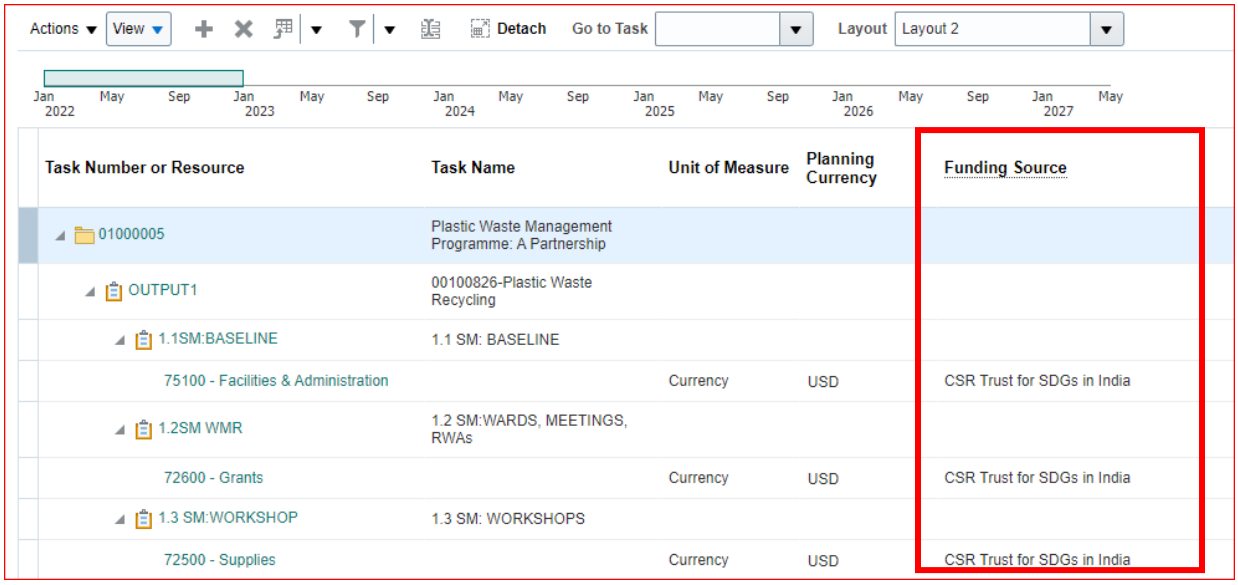
3.11 Validate Award Budget Task Name, Task Number and Resource Name

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects >> Manage Project Budget>> Click on version 1>> View >> Expand all below



3.12 Validate Funding source on task

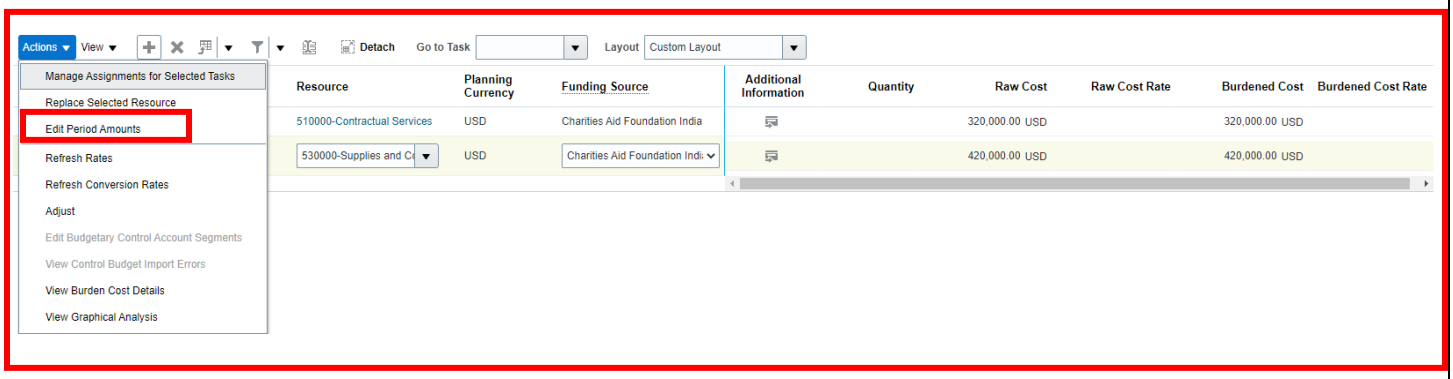
Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects >> Manage Project Budget>> Click on version 1>> View >> Expand all below>> Funding source



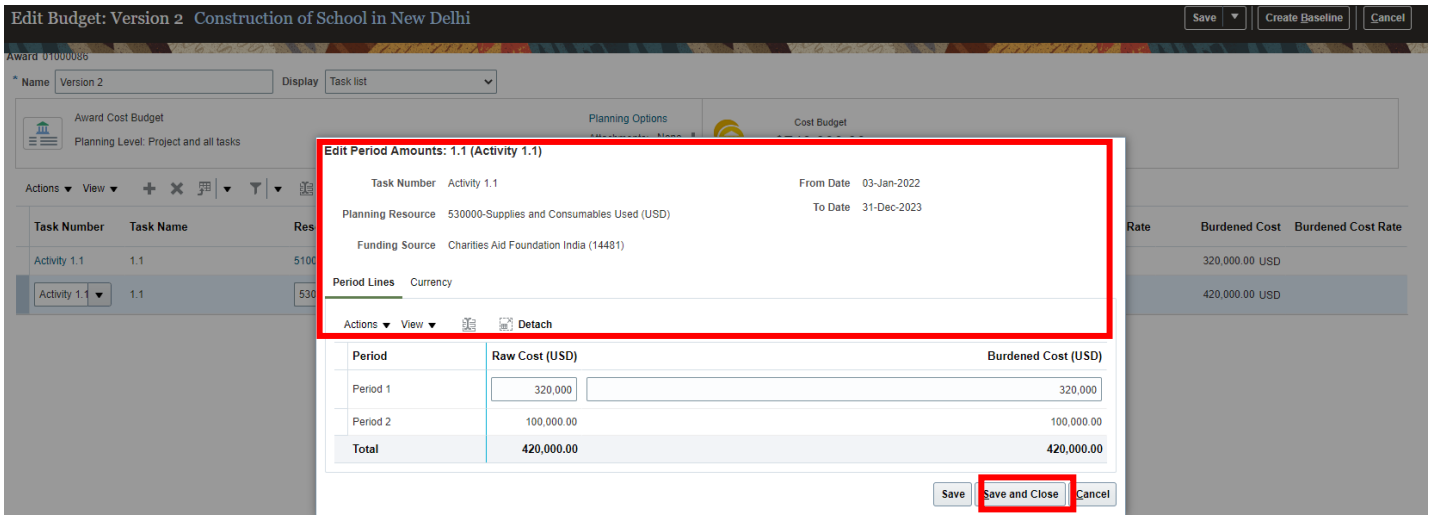
3.13 Validate Budget amount

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects >> Manage Project Budget>> Click on version 1>> View >> Expand all below>> Select the task >> Action Edit Period Amount

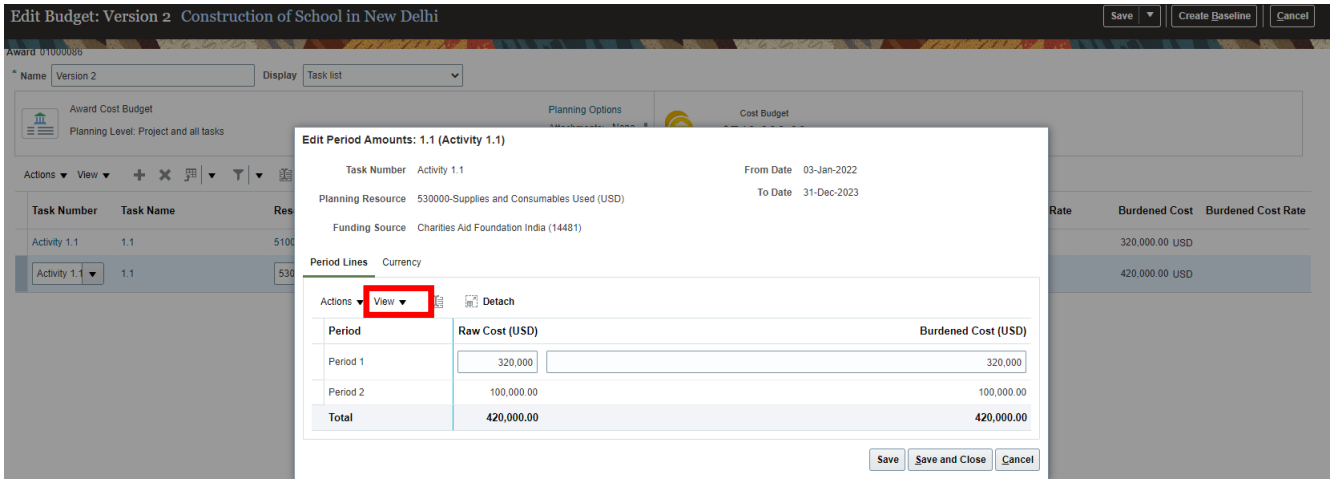
Highlight a row which you want to validate the amount and click Actions → Edit Period Amounts



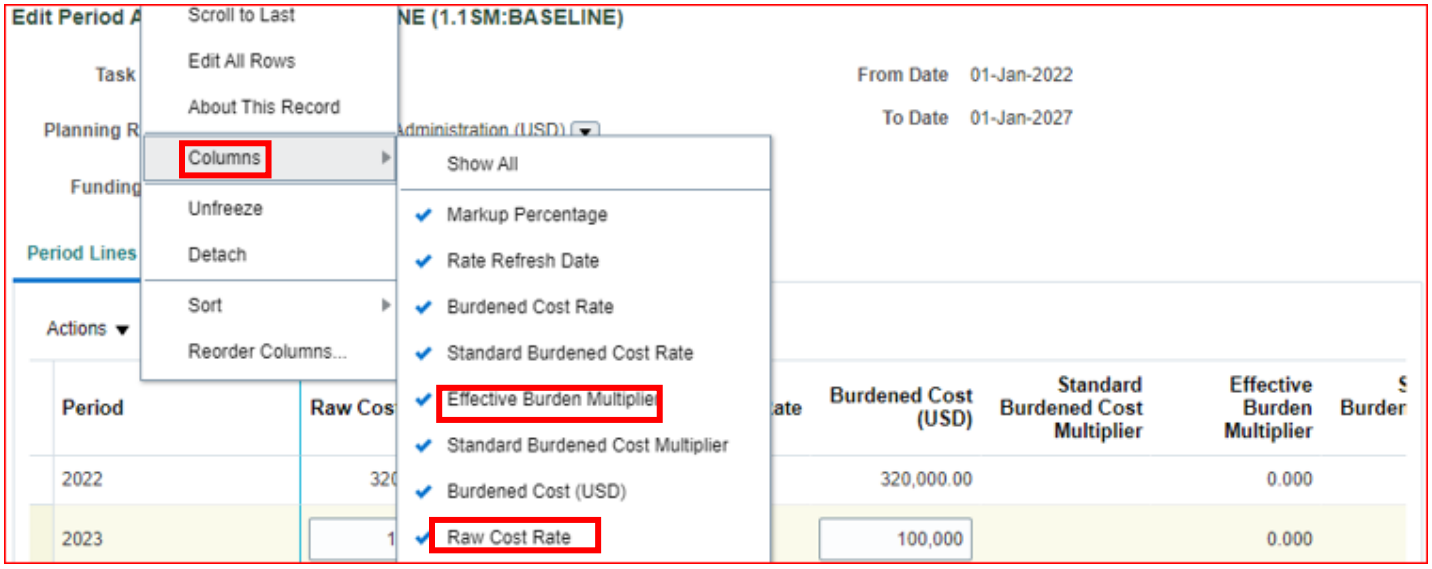
Period wise split of the total amounts would show up and you can edit them if needed. Note that the numbers are populated for both Raw cost and Burdened (GMS) cost.



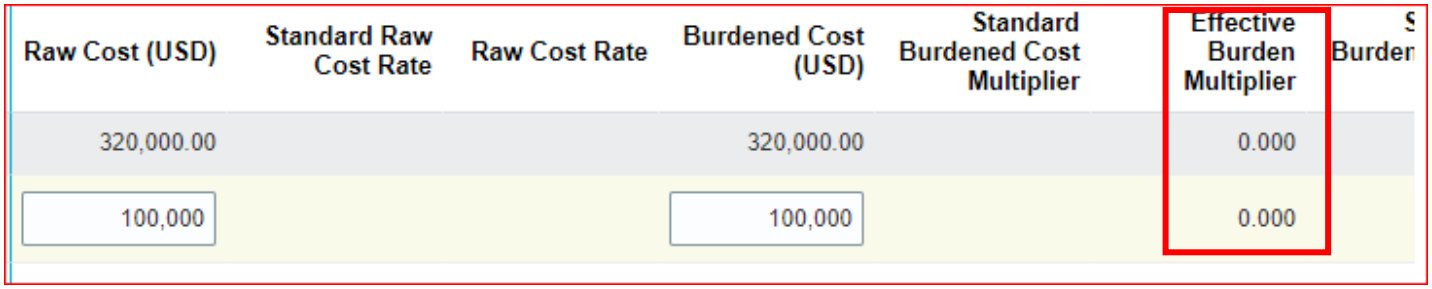
when we create a budget and try to update the period amounts then only burdened cost field show up by default and not the raw cost one, in that case click on View



Click on View >> Column >> Enable Raw cost and Effective Burden Multiplier.



Edit amount in both column raw cost and burden cost column and make sure that the amount should be same in both the column else multiplier will not be zero

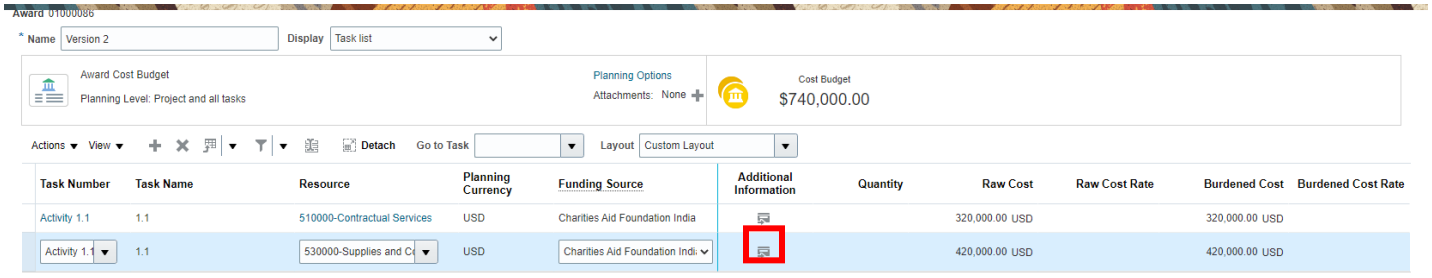


3.14 Validate the responsible party

To Validate the responsible party for a particular resource and activity hit additional information icon

Navigate- Login >> Grants Management >> Manage Award >> Search Award >> Edit >> Projects >> Manage Project Budget>> Click on version 1>> View >> Expand all below>> Select the task >> Additional Information

Note- In case the Additional column is not visible then- Click on View >> Column >> Enable Additional Information



4. Validate Award Contract created (Limited access and is managed by GSSC Team)

Converted Award Contract can be viewed in 'Contract Management' work area in the application.

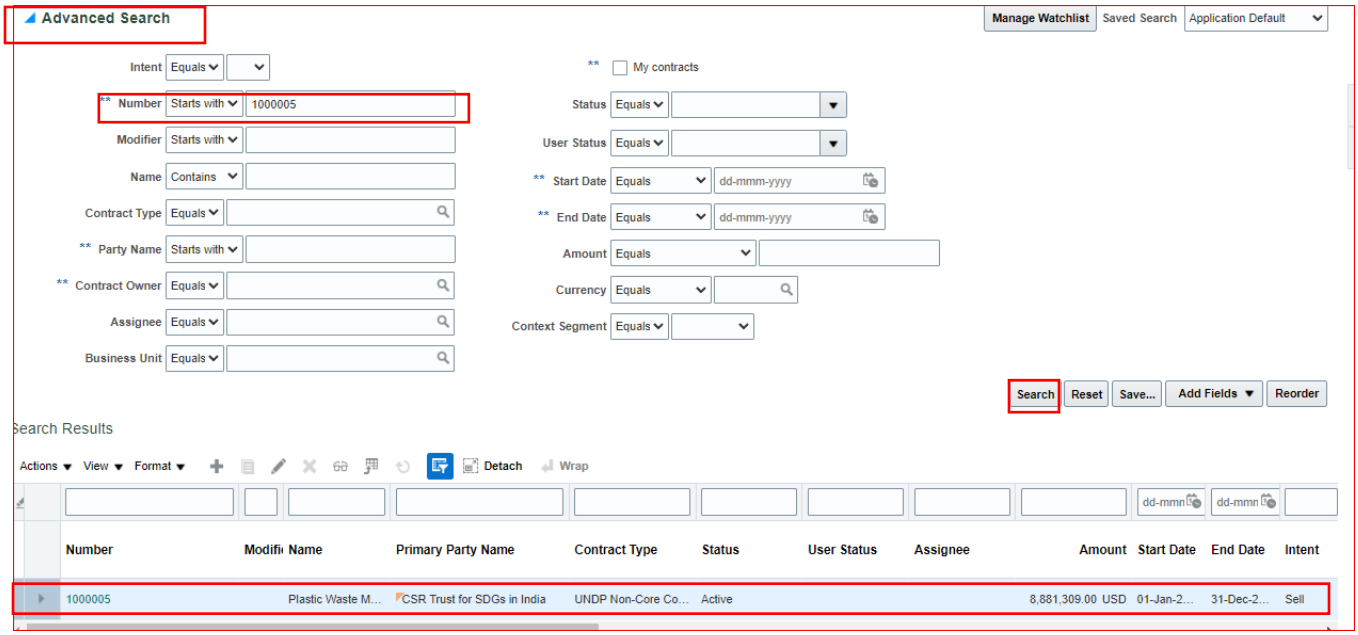
Navigate to '**Contract'** Work area.

From your PPM Application Home page,

7. Click on Contract Management
8. Work areas available under Contract Management are shown
9. Click on Contract

Navigate to contract workbench- Contract Management ➔ Contract ➔ Search for Contract by giving Award number (as award number and Contract number will be the same)

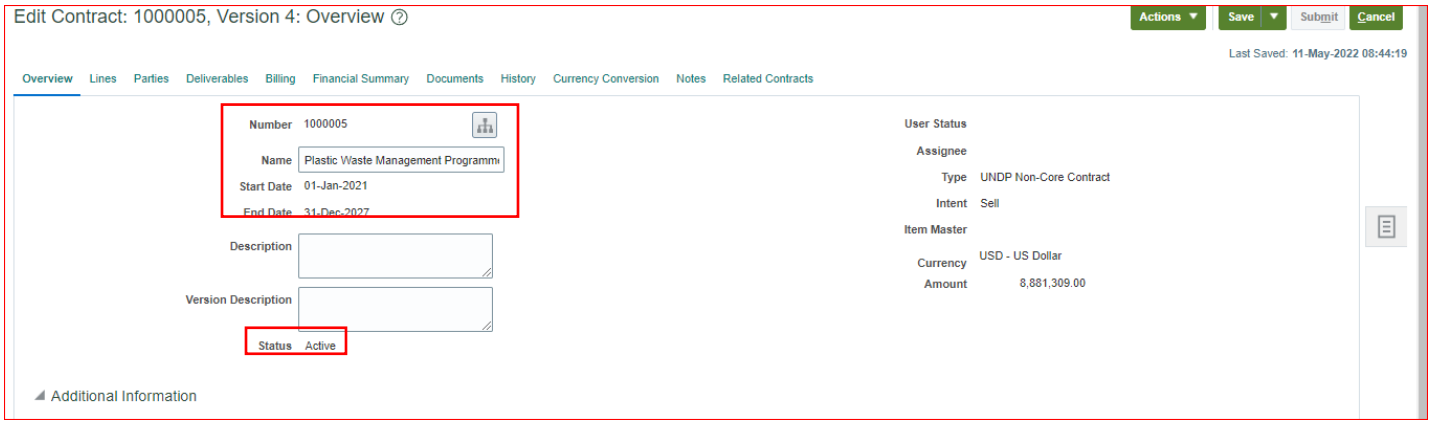
Search for Contract created from Award



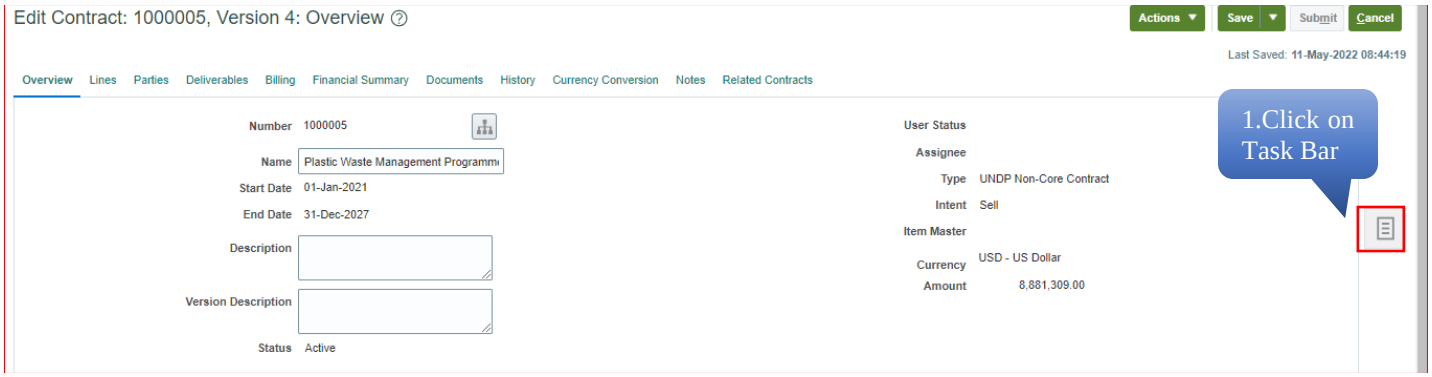
4.1 Validate Contract details

Following Contract Basic information can be validated in Line Tab

- Contract Name and Number
- Contract start and End Date
- Contract Status
- Contract Amount
- Additional Information

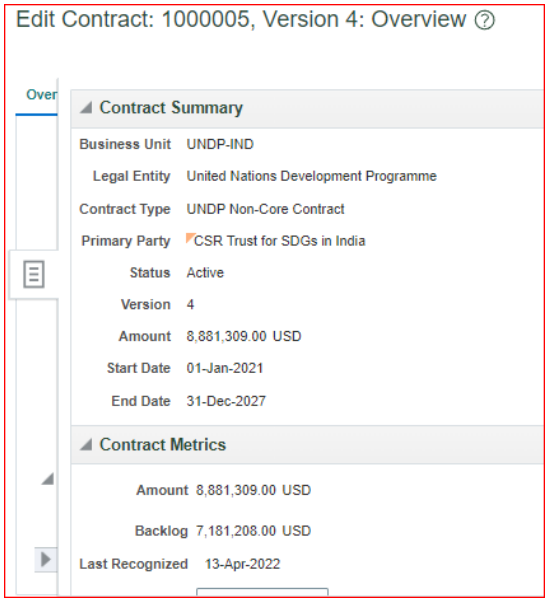


Review Contract Details'



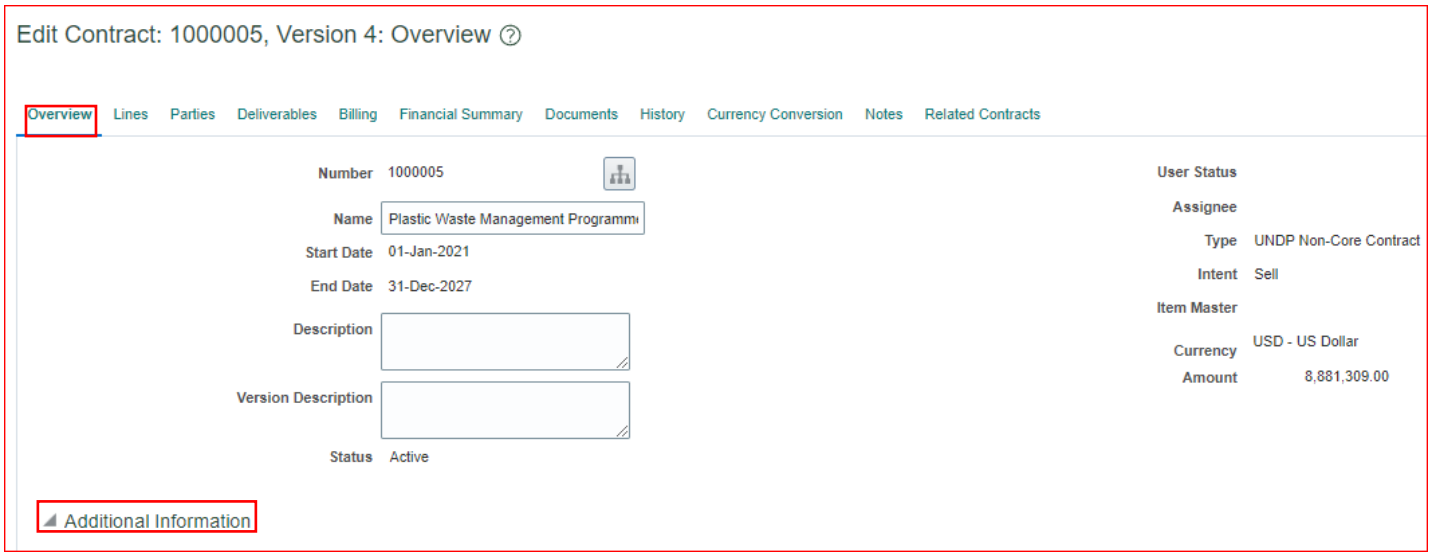
Contract & Award Summary –

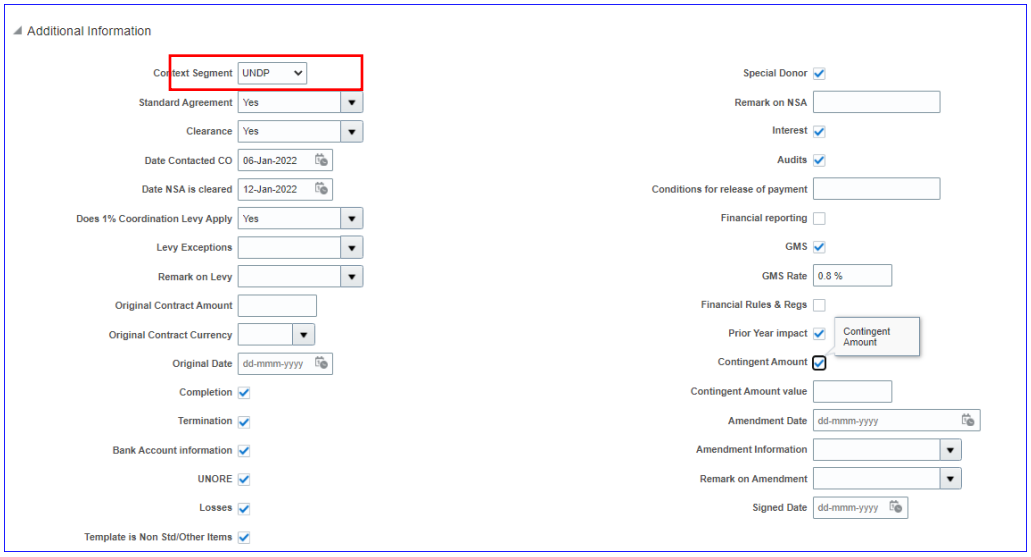
Contract Summary-



Validate Additional Information in Contract Overview

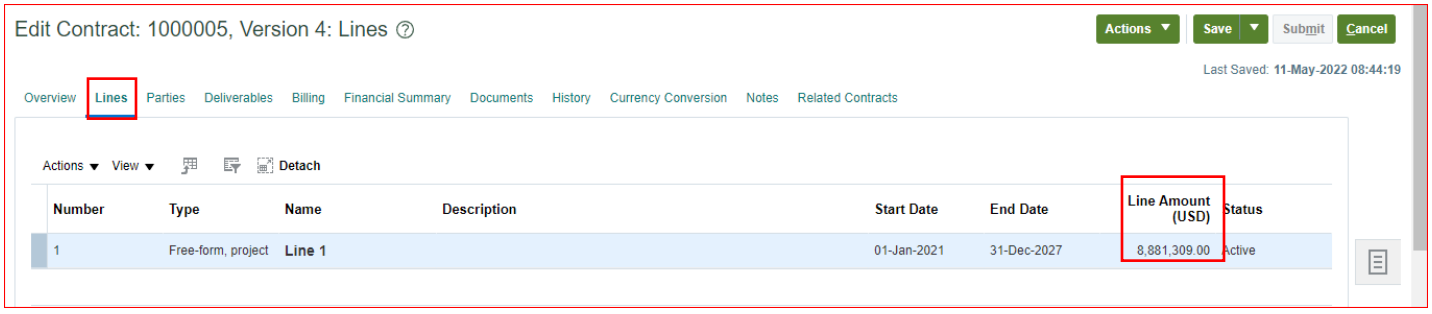
Navigation- Contract Management ➔ Contract ➔ Search ➔ Overview Tab➔ Additional Information ➔Context segment ➔ Fill details





4.2 Review Funding Amount at Contract

Check funding amount in contract lines. The funding amount at contract will be equal to the Award value.

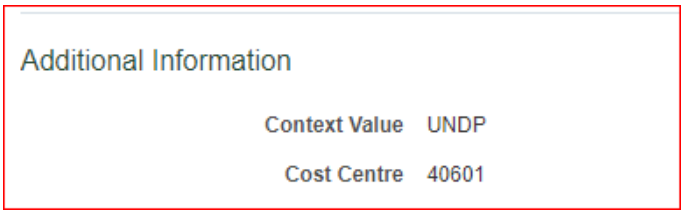


Note- On the contract, only External Funding Amount (i.e. donor funding) will be displayed. The Internal Funding Amount will not be part of the Contract value in case internal funding has been added to the award.

4.3 Validate Cost centre

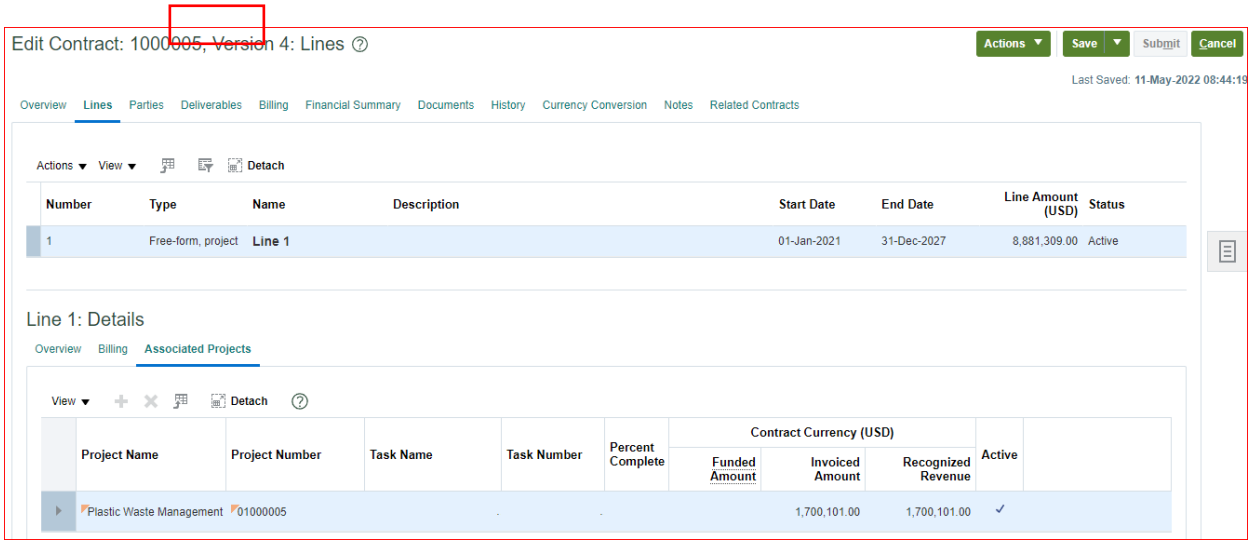
Navigation- Contract Management ➔ Contract ➔ Search ➔Lines ➔ Line 1 Details ➔ Overview ➔Additional Information

Check cost centre or department segment for revenue and billing are captured as additional flex fields at the line level.



4.4 Validate Project associated to the contract

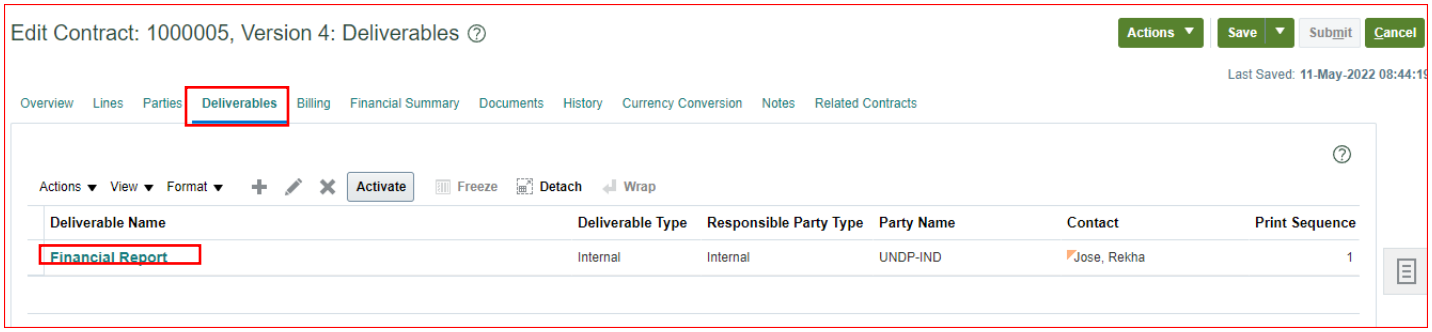
Navigation- Contract Management ➔ Contract ➔ Search ➔Lines ➔ Line 1 Details ➔ Line ➔Line details >>Associate Projects



4.5 Validate Deliverables

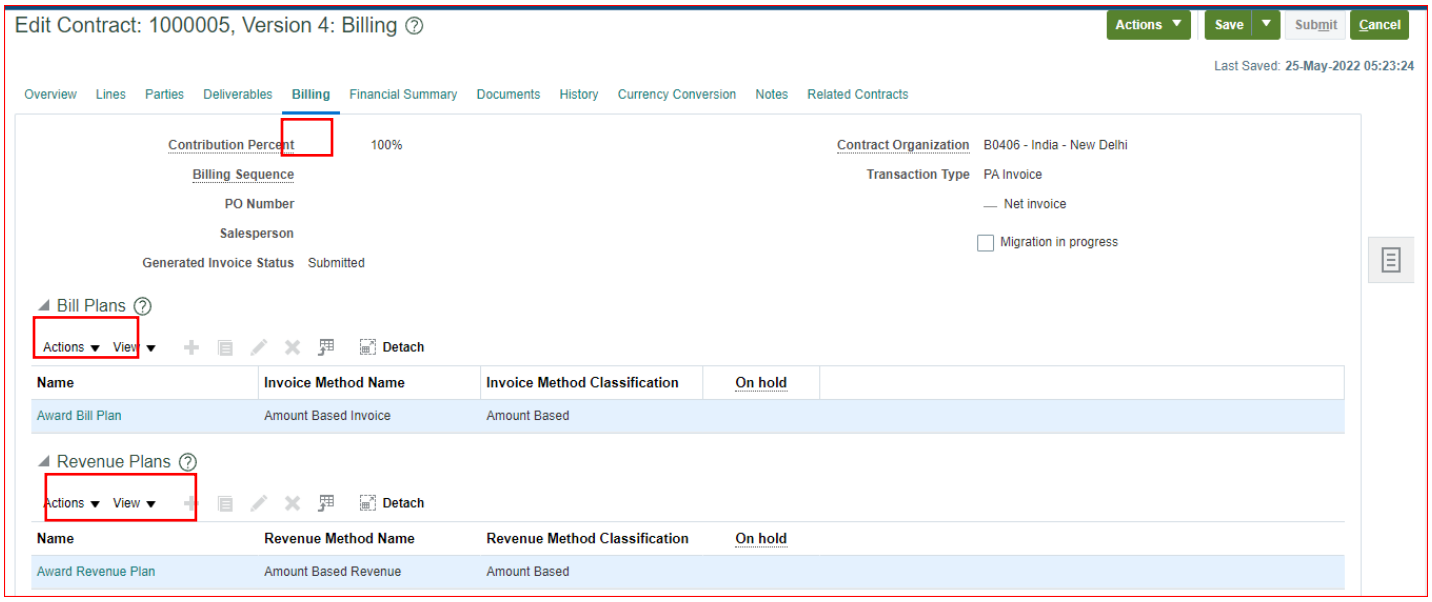
View deliverable to contract

Navigation- Contract Management ➔ Contract ➔ Search ➔Deliverables



4.6 Validate Billing Details

Validate the Billing details

Validate Bill Plan & Revenue Plan Method

Navigation- Contract Management ➔ Contract ➔ Search ➔Billing