

Grants Processing Course Exercise Guide

May 2013

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Exercise 1 – Display a Business Partner

Situation

You would like to view the master data of a Business Partner associated with a grant.

Portal Menu Path

Grants Management → Manage Master Data → Maintain/View Business Partner

Field	Value
BP Number	10001201
Click 	

Exercise 2 – Display a Customer Master

Situation

You would like to view the customer master that is linked to the Business Partner from the previous exercise.

Portal Menu Path

Grants Management → Manage Master Data → Display Customer

Field	Value
Customer	10001201
Company code	1000
Click 	
Click Company Code Data	
Click on each tab to display the information contained on each of the different tabs	

Exercise 3 – Display a Sponsored Program

Situation

You would like to view the details of a sponsored program.

Portal Menu Path

Grants Management → Manage Master Data → Maintain/View Sponsored Program

Field	Value
Sponsored Program	70A56
Click 	
Click on each tab to display the information contained on each of the different tabs	

Exercise 4 – Display a Sponsored Class

Situation

You would like to view the details of a sponsored class.

Portal Menu Path

Grants Management → Manage Master Data → Maintain/View Sponsored Class

Field	Value
Sponsored Class	520000
Click 	
Click on each tab to display the information contained on each of the different tabs	

Exercise 5 – Display a Grant

Situation

You would like to display a grant master record.

Portal Menu Path

Grants Management → Manage Master Data → Display Grant

Field	Value
Grant	200544
Click 	
Click on each tab to display the information contained on each of the different tabs	

Exercise 6 – Run the Grant Line Item Report

Situation

Prior to executing grant billing you need to run the Grant Line Item report to confirm that there are billable items have posted to the grant.

Portal Menu Path

Grants Management → Manage Information → Display Grant Line Items

Field	Value
Company code	1000
Grant	200237
Click 	
Click 	
Click /1 UNBILLED 1 Unbilled Items	
Check the Status column	For unbilled items this field should be blank

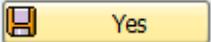
Exercise 7 – Run Grant Billing - Individual Processing

Situation

Run grant billing for your grant for all billable items up to today's date.

Portal Menu Path

Grants Management → Process Transactions → Generate Grant Billing (Individual)

Field	Value
Company code	1000
Grant	200237
Posting to	Today's date
Click 	
Click 	
Click 	
Write down the number in the DMR no. field	_____

Exercise 8 – Release Sales Order

Situation

After running grant billing you must release the sales order document associated with the grant.

Portal Menu Path

Grants Management → Manage Master Data → Release Orders for Billing

Field	Value
Sales organization	1000
SD document	Number from the Document field in the previous exercise
Click 	
Select the line item that you wish to process by entering a checkmark in the Sel check box	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Sel</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;"><input checked="" type="checkbox"/></div>
Click Delete billing block	
The number in the Sales Doc. field in the line you selected has been shaded green	
SAP displays the message “GMDebit memo Req-1 2xxxxxxx has been saved”	

Exercise 9 – Create Billing Document

Situation

After releasing the sales order you can create the billing document in SAP.

Portal Menu Path

Grants Management → Process Transactions → Create Billing Document

Field	Value
Document	Enter the DMR number from Exercise 7
Click 	
Click 	
SAP displays the message “Document 99xxxxxx has been saved.” This is the billing document.	
Write down the billing document number	_____

Exercise 10 – Run the Grant Line Item Report

Situation

After to executing grant billing process you need to run the Grant Line Item report to confirm that the previously billable items now show a status of “B” for billed.

Portal Menu Path

Grants Management → Manage Information → Display Grant Line Items

Field	Value
Company code	1000
Grant	200237
Click 	
Click 	
Click /1 UNBILLED 1 Unbilled Items	
Check the Status column	For unbilled items this field should be blank
Click /1 BILLED 1 Billed Items	
Check the Status column	Billed items will have a “B”

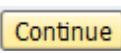
Exercise 11 –Request Correspondence

Situation

After creating the billing document you wish to display it along with the accounting document.

Portal Menu Path

Grants Management → Process Transactions → Display Billing Document

Field	Value
Document	Enter the billing document that starts with “9” from the previous exercise
Click 	
Click  Accounting	
In the pop-up double click on the Accounting document t that starts with 2	
Select the menu path Environment → Correspondence	
Corr.	ZGM19
Click 	
Click 	
SAP displays the message  GM Customer Invoice was requested	

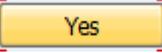
Exercise 12 –Trigger Correspondence

Situation

Printing the invoice is a two-step process. The first step is to trigger correspondence.

Portal Menu Path

Grants Management → Period End Closing → Print Customer Correspondence per Request

Field	Value
Correspondence	ZGM19
Company code	1000
Document number	Enter the invoice number from the previous exercise (starts with 2)
Fiscal year	2013
Click 	
Click 	
	
Spool no.	Write down the spool number for your correspondence without commas _____

Exercise 13 – Print an Invoice from the Spool

Situation

After triggering correspondence for your invoice you must go to the spool to print.

Portal Menu Path

Grants Management → Period End Closing → Display Spool Request

Field	Value
Spool request number	Spool request number from the previous exercise
Date created	Today's date
Fiscal year	2013
Click 	
Type	Click 
Click 	
Spool no.	Select <input checked="" type="checkbox"/>
Click 	