
Sample Document for SAP Grantor
Management End User Documents





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For any suggestion / improvement / feedback / correction / error
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At
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Functional Description

A set of 22 word files covers the entire life cycle of Grantor Management is available for immediate download. These documents cover How to do the transaction in SAP Grantor management in step by step manner with the help of system screenshots.

This Document is one of sample documents for Grantor Management EUT to understand the depth of explanation and help given in these documents.

These documents cover following business processes of Grantor Management in very systematic manner.

- 01 - Logon to CRM GM System
- 02 - Create a Program (PSCD)-MultiFund-APAR
- 03 - Create Budget for program
- 04 - Register a Grantee
- 05 - Create an Application Form as Grantor
- 06 - Create an Application Form as Grantee
- 07 - Assess Application (BSP Web Request)
- 08 - Show Pre-commitment in ERP
- 09 - Show Budget Consumption
- 10 - Create Agreement
- 11 - Show commitment in ERP
- 12 - Show Budget Consumption After Commitment
- 13 - Invoicing Run (PSCD)
- 14 - Invoicing Run (AP-AR)
- 15 - Payment Run (PSCD)
- 16 - Payment Run (APAR)
- 17 - Claim Processing
- 18 - Change Request Processing
- 19 - Show Case Record
- 20 -Transfer PSCD to FI-GL (PSCD)
- 21 - Demonstrate MS Word integration
- 22 - Change the CRM User Interface

These documents can use for end user training and you can use this documents to learn grantor management. With the help of these documents you will be able to learn Sap Grantor Management very quickly.

These documents help you to understand how to run transactions in SAP CRM Grantor Management and complete your business process. These documents are very helpful for the entire sap user even if they are new to SAP CRM screens.



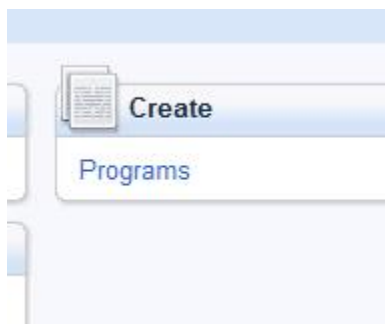
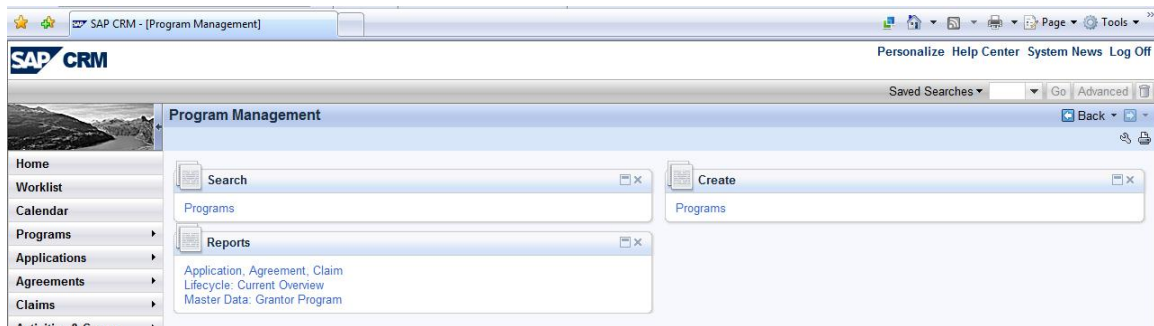
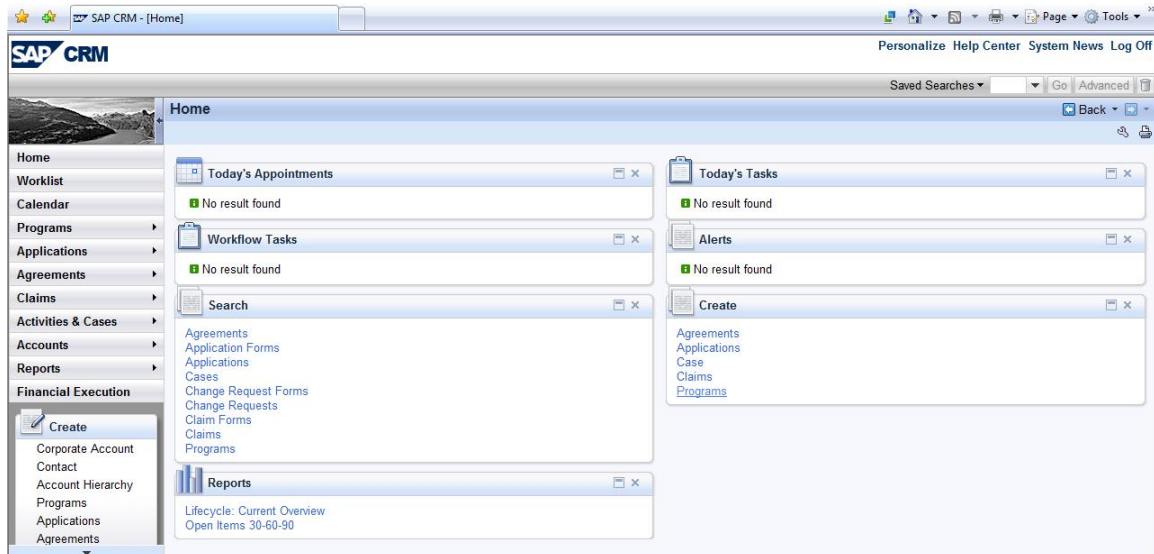
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Create a Program (PSCD)

1. Create a new Program by clicking on "Programs" on the left navigation bar. Click on link "Programs" under the Create section.





2. Fill out the screen with the following information

Program ID	<do no include the term test in your description>
Description	<do no include the term test in your description> Ex "Housing Assistance Program"
Start Date	1.1.2008 till today **
End Date	<today> till <maximum 2012> **
Service Organization	Grantor service organizational (O 50001231)
Program Mgmt Area	Grantor Program Management Area (O 50001232 99)
Status	Released
Currency	USD
Program Profile	Housing (PSCD)

The screenshot shows a software interface with two main sections: 'Program Details' and 'Partners'.

Program Details: This section contains various input fields and dropdown menus. The 'Program ID' is set to 'PROG-AB'. The 'Description' is 'Housing Assitance Program'. The 'Start Date' is '01.07.2009' and the 'End Date' is '01.07.2010'. The 'Service Organization Description' is 'Grantor Service Organization', and the 'Program Management Area' is 'O 50001232 99'. The 'Status' is 'Created', and the 'Currency' is 'USD'. The 'Program Profile' is 'Housing (PSCD)'. There are also fields for 'Employee Resp.' (Grantor Employee) and 'Last Changed By/On'.

Partners: This section shows a table with columns for 'Actions', 'Partner Function', 'Partner Function ID', 'Name', 'Address', and 'Mai...'. The table contains one row with the following data: 'Employee responsible' (Partner Function), '7300000025' (Partner Function ID), 'Grantor Employee' (Name), and 'GRANTOR EMPLOYEE / TUCKSVI...' (Address). There are also some empty rows and a '00000160' entry in the Partner Function column.

3. Fill out the data so that it looks like on the screenshot below



Object Type	Transaction Type	Web Form	Questionnaire	Rule Set
Agreement	Grantor Agreement		GRANTOR_HOUSING_GAG_SU	7DEMO
Application	Grantor Application	SAPGAPDEMO	GRANTOR_HOUSING_GAP_SU	7DEMO
Change Request	Grantor Change Req.	SAPGCR		7CHANGE_REQUEST_RS
Claim	Grantor Claim	SAPGCLDEMO		7GCLDEMO1

Click the Back button.

4. Click Expense Types Insert button of the assignment block "Expense Types"

Fill out the data so that it looks like on the screenshot below. Use the "insert" button two create a second entry.

Expense Catalog	Expense Group	Expense Type
Catalog of Subsidy Expense Types	Construction Planning and Design	Landscape Architecture
Catalog of Subsidy Expense Types	Construction Planning and Design	Architect's Fees

5. Click the Save button.
6. Click Program Details Edit button of Program Details assignment block.

The screenshot shows the SAP CRM interface for a Grantor Program. The main area displays the "Program Details" for "PROG-AB, Housing Assistance Program". The details include:

- Program ID: PROG-AB
- Description: Housing Assistance Program
- Higher-Level ID: [blank]
- Program Type: [blank]
- Start Date: 01.07.2009
- End Date: 30.06.2010
- Employee Resp.: Grantor Employee
- Service Organization Description: Grantor Service Organization
- Program Management Area: O 50001232 99
- Status: Created
- Last Changed By/On: /
- Currency: USD
- Program Profile: Housing (PSCD)

Below the program details, there is a "Partners" section with one entry:

Actions	Partner Function	Partner Function ID	Name	Address	Mai...
	Employee responsible	7300000025	Grantor Employee	GRANTOR EMPLOYEE / TUCKSVIL...	

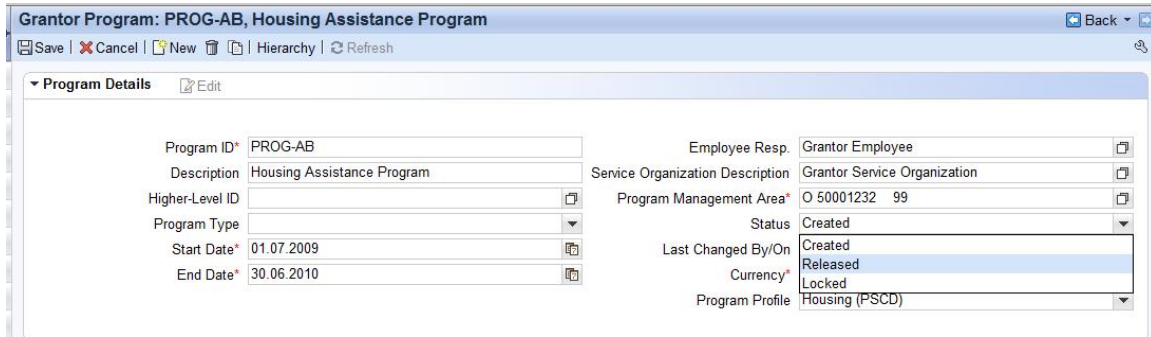
At the bottom, there is a "Process Control" section with one entry:

Application	Change Request
[blank]	[blank]



7. Change the Status to Released. Status

8. Click the  Save button.



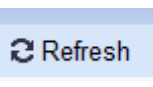
Grantor Program: PROG-AB, Housing Assistance Program

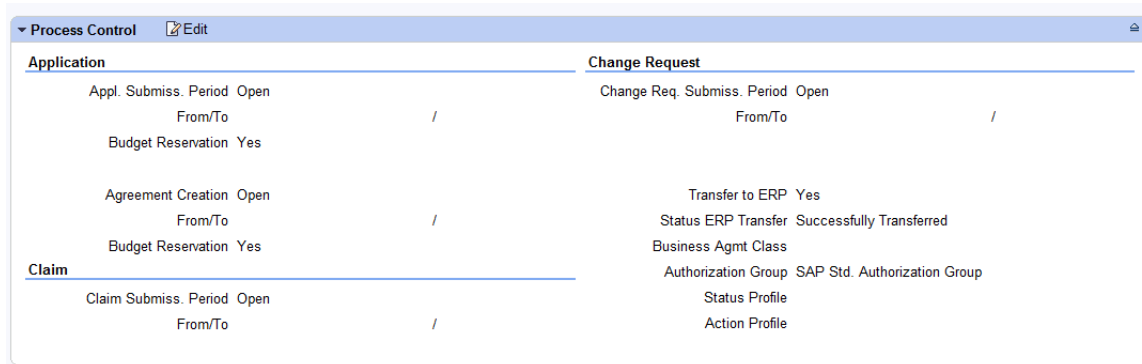
Save | Cancel | New | Hierarchy | Refresh

Program Details Edit

Program ID*	PROG-AB	Employee Resp.	Grantor Employee
Description	Housing Assistance Program	Service Organization Description	Grantor Service Organization
Higher-Level ID		Program Management Area*	O 50001232 99
Program Type		Status	Created
Start Date*	01.07.2009	Last Changed By/On	Created
End Date*	30.06.2010	Currency*	Released
		Program Profile	Locked
			Housing (PSCD)

Result: You have created a program which will serve as central instance to manage the life-cycle of grantee processing. The program is replicated to ERP once the status is set to released.

Now press On  Refresh

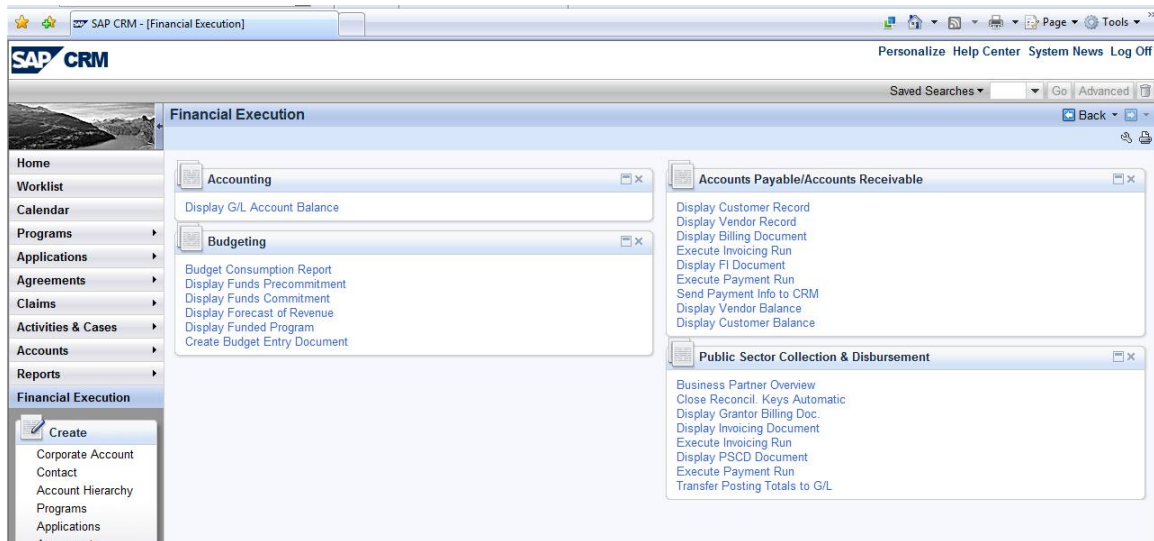


Application		Change Request	
Appl. Submiss. Period	Open	Change Req. Submiss. Period	Open
From/To	/	From/To	/
Budget Reservation	Yes		
Agreement Creation	Open	Transfer to ERP	Yes
From/To	/	Status ERP Transfer	Successfully Transferred
Budget Reservation	Yes	Business Agmt Class	
Claim		Authorization Group	SAP Std. Authorization Group
Claim Submiss. Period	Open	Status Profile	
From/To	/	Action Profile	

Now we can display this program "PROG-AB" in EPR as funded program

Optional – Display funded program in ERP

9. Click on the link "Financial Execution" on the left navigation bar.



10. Click on the link “Display Funded Program” in the section “Budgeting”



System will ask you to provide the login details for EPR System to get access in EPR.

11. Enter the CRM Program ID into the “Funded Program” field

12. Enter the FM area: GTRO into the “FM Area” field



Display Funded Program

Display Funded Program

Menu Back Exit Cancel System Other Funded Program Validate FM Derivation Tool Where-Used List

Funded Program
FM Area

Description
Name
Description

Basic Data
Funded Program Type
Valid from Valid to
Expiration Date

13. Press  button or hit "Enter"

Display Funded Program

Display Funded Program

Menu Back Exit Cancel System Other Funded Program Validate FM Derivation Tool Where-Used List

Funded Program
FM Area Grantor Management

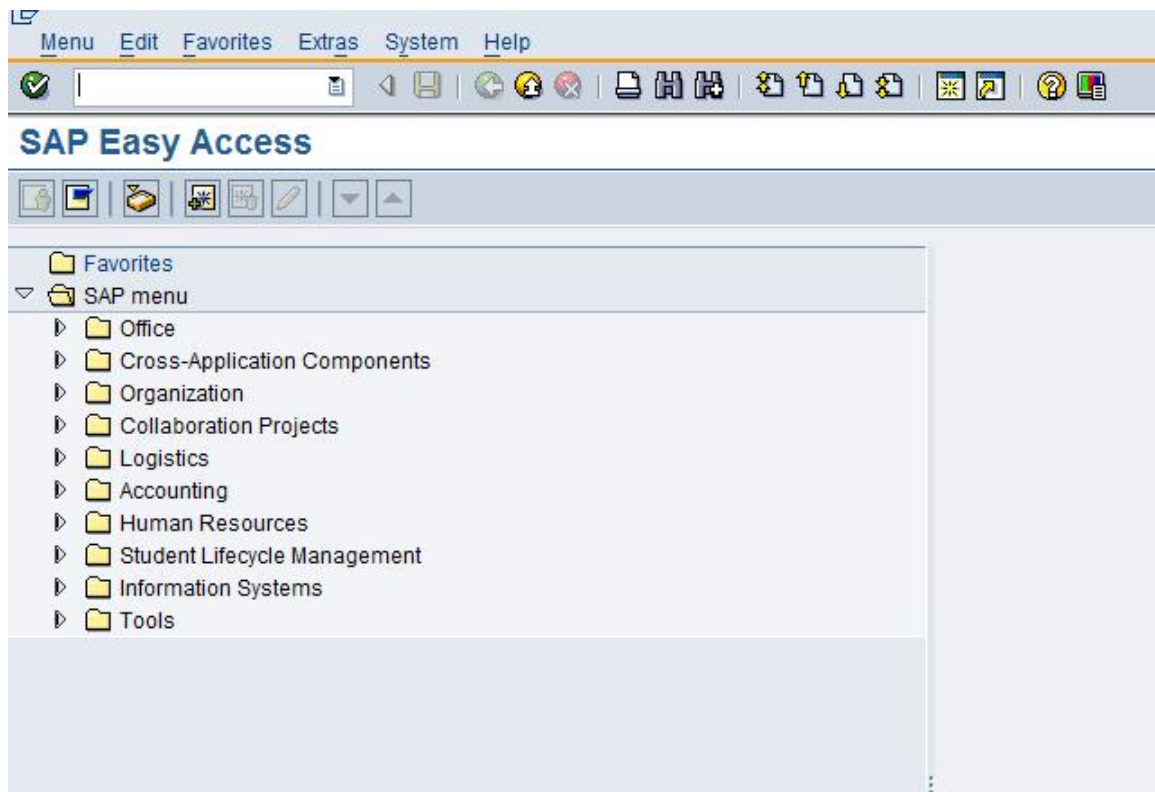
Category
Funded Program Cat. Grantor Management

Description
Name
Description

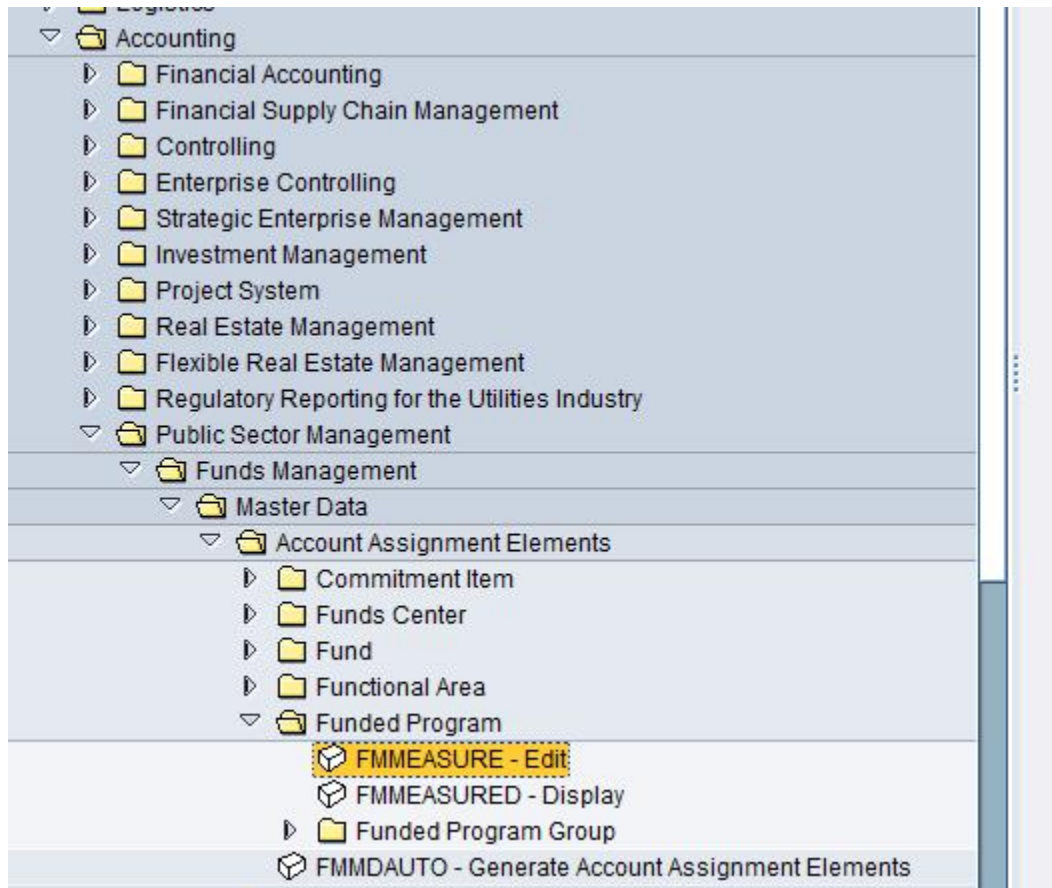
Basic Data
Funded Program Type
Valid from Valid to
Expiration Date

Authorization Group
Authorization Group

Alternatively you can display this program by login into back end system and display the Funded program



FMMEASURE – Edit





Funded Program Edit Goto Extras Environment System Help

Display Funded Program

FM Derivation Tool Where-Used List

Funded Program **PROG-AB**

FM Area **GTR0** Grantor Management

Category

Funded Program Cat. **GTR** Grantor Management

Description

Name **Housing Assistance P**

Description **Housing Assistance Program**

Basic Data

Funded Program Type

Valid from **06/30/2009** Valid to **06/29/2010**

Expiration Date

Authorization Group

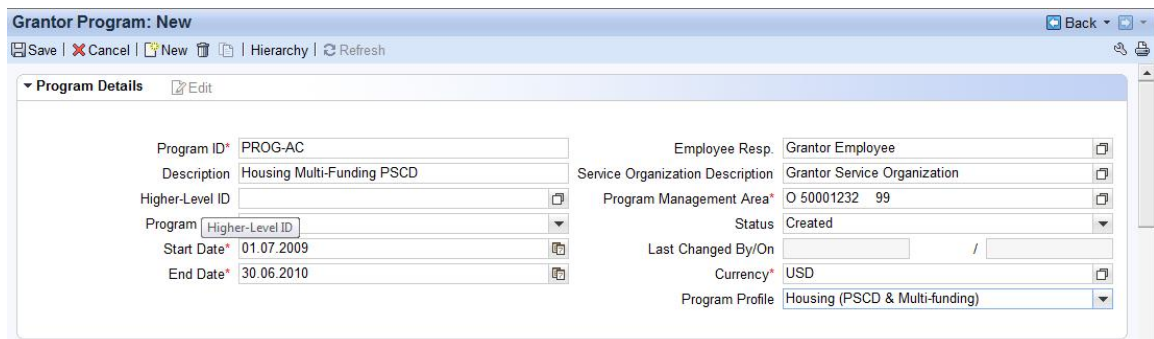
Authorization Group

Note: Funded program is a master data of Funds Management. This can be used for budgeting and account assignment object for budget availability control check.



Create a Program which is Multi-Funding enabled (PSCD)

- Execute all the steps of "Create a Program (PSCD)" but use Program Profile "Housing (PSCD & Multifunding)" instead of "Housing (PSCD)"



Transfer to ERP Yes No

Status ERP Transfer

Business Agmt Class

Authorization Group




Status Profile

Action Profile



▼ Process Assignments Edit List

Actions	Object Type	Transaction Type	Web Form	Questionnaire	Rule Set
	Agreement	Grantor Agreement		GRANTOR_HOUSING_C	7DEMO
	Application	Grantor Application	SAPGAPDEMO	GRANTOR_HOUSING_C	7DEMO
	Change Request	Change Request	SAPGCR		7CHANGE_REQUEST_f
	Claim	Claim	SAPGCLDEMO		7GCLDEMO1

15. If the Multi-Funding assignment block is not visible on the screen then on the program overview page click on the  "Personalize" button to add the "Multi-funding" assignment block
16. Mark the entry "Multi-funding" on the list and click the  button
17. Click  button
Note: system will ask you to give login details for ERP System. Put login id and password for EPR System .
18. Scroll to the assignment block "Multi-funding"


▼ Multi-Funding 

Multi-Funding Rule (New)

Company Code GTR0
Program Profile HOUS_MF Program PROG-AC

Percentage Distribution

Funds Center	Percentage
GTR1	70.00
GTR2	30.00

19. Click the edit  button on the multi-funding block
20. Change the existing percentage values or add a new line with fund center "GTR2".



Multi-Funding

✓ Back

Multi-Funding Rule (New)

Company Code GTR0
Program Profile HOUS_MF Program PROG-AC

Save Rule Delete Rule Display Mode Check

Percentage Distribution

Insert Line Delete Selected Check Lines

Funds Center	Percentage
GTR1	70.00
GTR2	30.00

Note: the sum of all lines has to be 100%. The values you see before you change anything are set up in the ERP system and linked to the program profile. I.e. per program profile different default values are possible.

21. Click the **Save Rule** button and click the **✓ Back** button.



Multi-Funding
✓ Back

Multi-Funding Rule (\$GTR00000014)

Company Code GTR0
Program Profile HOUS_MF Program PROG-AC

Save Rule Delete Rule Change Mode Check

✓ Saved successfully

Percentage Distribution

Insert Line Delete Selected Check Lines

Funds Center	Percentage
GTR1	70.00
GTR2	30.00

Grantor Program: PROG-AC, Housing Multi-Funding PSCD

Save | Cancel | New | Hierarchy | Refresh

Program Details Edit

Data has been saved

Program ID	PROG-AC	Employee Resp.	Grantor Employee
Description	Housing Multi-Funding PSCD	Service Organization Description	Grantor Service Organization
Higher-Level ID		Program Management Area	O 50001232 99
Program Type		Status	Created
Start Date	01.07.2009	Last Changed By/On	/
End Date	30.06.2010	Currency	USD
		Program Profile	Housing (PSCD & Multi-funding)

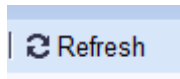
Now edit this program and change the status for "Released"



▼ Program Details Edit

Program ID	PROG-AC	Employee Resp.	Grantor Employee
Des	<input type="text" value="Program ID"/> sing Multi-Funding PSCD	Service Organization Description	Grantor Service Organization
Higher-Level ID		Program Management Area	O 50001232 99
Program Type		Status	Released
Start Date	01.07.2009	Last Changed By/On	GRANTMGR / 19.07.2009
End Date	30.06.2010	Currency	USD
		Program Profile	Housing (PSCD & Multi-funding)

Press "SAVE" and Press "Refresh"



▼ Process Control Edit

Application	Change Request
Appl. Submiss. Period Open From/To /	Change Req. Submiss. Period Open From/To /
Budget Reservation Yes	
Agreement Creation Open From/To /	Transfer to ERP Yes
Budget Reservation Yes	Status ERP Transfer Successfully Transferred
	Business Agmt Class
	Authorization Group SAP Std. Authorization Group
	Status Profile
	Action Profile

Claim

Claim Submiss. Period Open From/To /

Now at this time program has been created in back end ERP system. You can display this program as shown below



Funded Program Edit Goto Extras Environment System Help

Display Funded Program

FM Derivation Tool Where-Used List

Funded Program **PROG-AC**

FM Area **GTR0** Grantor Management

Category

Funded Program Cat. **GTR** Grantor Management

Description

Name **Housing Multi-Fundin**

Description **Housing Multi-Funding PSCD**

Basic Data

Funded Program Type

Valid from **06/30/2009** Valid to **06/29/2010**

Expiration Date

Authorization Group

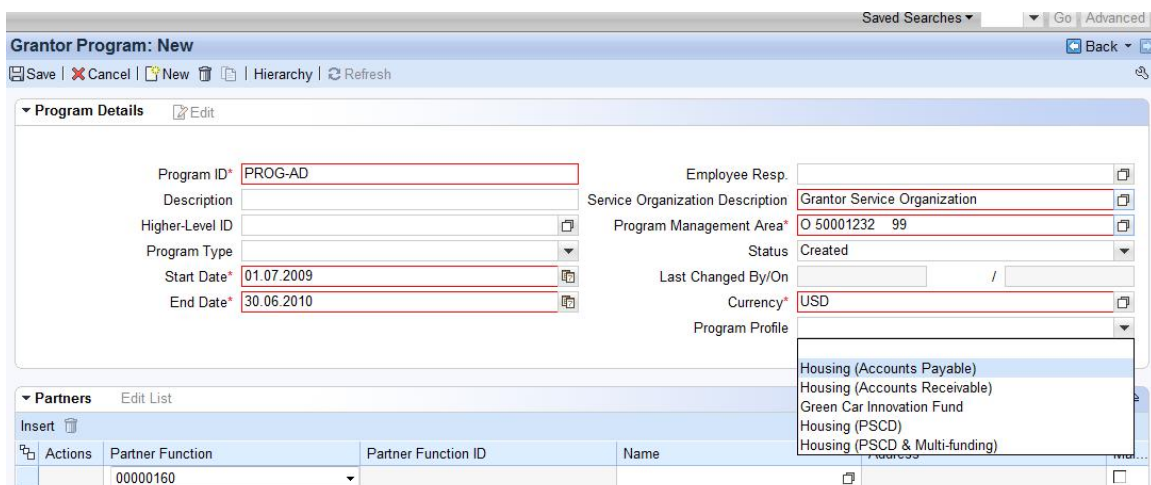
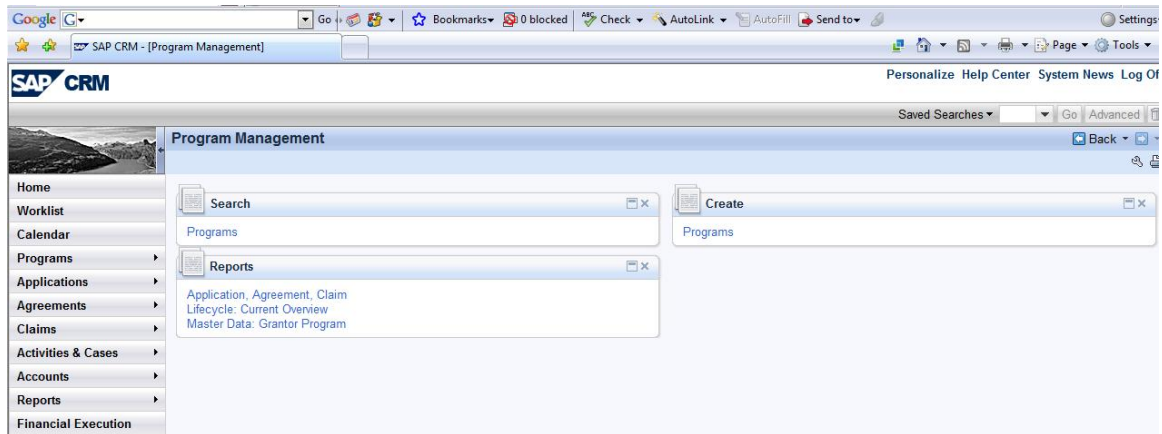
Authorization Group



Create a Program (AP/AR)

22. Execute all the steps of "Create a Program(PSCD)" but use Program Profile "Accounts Payable Integration" or "Accounts Receivable Int."

Note: You need to decide on the program whether you want to post all related agreements/claims into the Accounts Payable or the Accounts Receivable ledger.





Currency **USD**

Program Profile

- Housing (Accounts Payable)
- Housing (Accounts Receivable)
- Green Car Innovation Fund
- Housing (PSCD)
- Housing (PSCD & Multi-funding)

Program Details Edit

Program ID* PROG-AD

Description

Higher-Level ID

Program Type

Start Date* 01.07.2009

End Date* 30.06.2010

Employee Resp. Grantor Employee

Service Organization Description Grantor Service Organization

Program Management Area* O 50001232 99

Status Created

Last Changed By/On

Currency* USD

Program Profile Housing (Accounts Payable)

Process Control Edit

Appl. Submiss. Period Open Blocked Date Restriction

From: To:

Budget Reservation Yes No

Agreement

Agreement Creation Open Blocked Date Restriction

From: To:

Budget Reservation Yes No

Claim Submiss. Period Open Blocked Date Restriction

From: To:

Change Req. Submiss. Period Open Blocked Date Restriction

From: To:

Transfer to ERP Yes No

Status ERP Transfer Not Transferred

Business Agmt Class

Authorization Group SAP Std. Authorization Group

Status Profile

Action Profile

Process Assignments Edit List

Actions	Object Type	Transaction Type	Web Form	Questionnaire	Rule Set
	Agreement	Grantor Agreement		GRANTOR_HOUSING_C	7DEMO
	Application	Grantor Application	SAPGAPDEMO	GRANTOR_HOUSING_C	7DEMO
	Change Request	Change Request	SAPGCR		7CHANGE_REQUEST_F
	Claim	Claim	SAPGCLDEMO		7GCLDEMO1

Expense Types Edit List

Actions	Expense Catalog	Expense Group	Expense Type
	Catalog of Subsidy Expense Types	Construction Planning and Design	Landscape Architecture
	Catalog of Subsidy Expense Types	Construction Planning and Design	Architect's Fees



Grantor Program: New

Save | Cancel | New | Hierarchy | Refresh

To: _____

Grantor Program: PROG-AD

Save | Cancel | New | Hierarchy | Refresh

Program Details Edit

Program ID	PROG-AD	Employee Resp.	Grantor Employee
Description		Service Organization Description	Grantor Service Organization
Higher-Level ID		Program Management Area	O 50001232 99
Program Type		Status	Created
Start Date	01.07.2009	Last Changed By/On	/
End Date	30.06.2010	Currency	USD
		Program Profile	Housing (Accounts Payable)

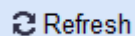
Grantor Program: PROG-AD

Save | Cancel | New | Hierarchy | Refresh

Program Details Edit

Program ID*	PROG-AD	Employee Resp.	Grantor Employee
Description		Service Organization Description	Grantor Service Organization
Higher-Level ID		Program Management Area*	O 50001232 99
Program Type		Status	Created
Start Date*	01.07.2009	Last Changed By/On	Created
End Date*	30.06.2010	Currency*	Released
		Program Profile	Locked
			Housing (Accounts Payable)

Press "SAVE" and Press "Refresh"

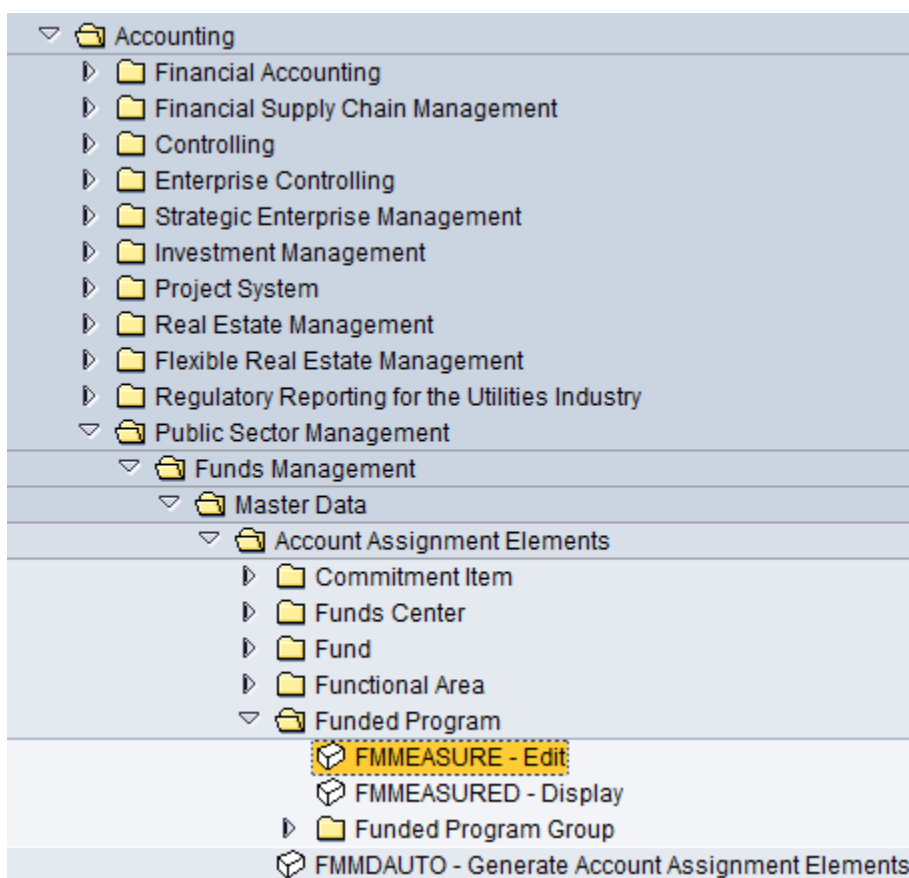




Process Control		Edit	
Application		Change Request	
Appl. Submiss. Period	Open	Change Req. Submiss. Period	Open
From/To	/	From/To	/
Budget Reservation	Yes	From/To	/
Agreement Creation	Open	Transfer to ERP	Yes
From/To	/	Status ERP Transfer	Successfully Transferred
Budget Reservation	Yes	Business Agmt Class	
Claim		Authorization Group	SAP Std. Authorization Group
Claim Submiss. Period	Open	Status Profile	
From/To	/	Action Profile	

Now at this time program has been created in back end ERP system. You can display this program as shown below

FMMEASURE – Edit





Funded Program Edit Goto Extras Environment System Help

Display Funded Program

FM Derivation Tool Where-Used List

Funded Program

FM Area Grantor Management

Category

Funded Program Cat. Grantor Management

Description

Name

Description

Basic Data

Funded Program Type

Valid from Valid to

Expiration Date

Authorization Group

Authorization Group