



GRANTS MANAGEMENT SOLUTION WALKTHROUGH 2016 RELEASE

DATE: THURSDAY, NOVEMBER 12, 2015

TIME: 9:00 AM – 12:00 PM

LOCATION: 2000 EVERGREEN STREET SACRAMENTO, CA 95815

ROOM: JADE/SAPPHIRE

Facilitators:	Ben Montie – CMO Gina Esperanza & Edmond Lee – BT Kamna Joshi - Accenture
Meeting Purpose:	Grants Management Solution Walkthrough 2016 Release
Type of Meeting:	

AGENDA TOPICS/MINUTES

#	Topic	Presenter	Duration
1	<ul style="list-style-type: none"> ■ Solution Walkthrough Objectives ■ Grants Management Solution Overview ■ Grants Processes <ul style="list-style-type: none"> <input type="checkbox"/> Create Proposal <input type="checkbox"/> Generate Award <input type="checkbox"/> Update Award Profile <input type="checkbox"/> Process Grants ■ Technology Considerations <ul style="list-style-type: none"> <input type="checkbox"/> FI\$Cal Grants Management Demonstration ■ Q&A session 	Ben Montie & Gina Esperanza	180 Mins

QUESTIONS AND ANSWERS

Q1: Do all of the Activities go into a single place?	A1: Projects are associated to activities.
Q2: We have 15 different projects with splits. Are we able to have different splits for each project?	A2: Yes.
Q3: Some departments use the Feasibility Study report (FSR). Will we need to do the FSR manually?	A3: Yes, the System does not generate an FSR at the moment.
Q4: What we are learning today is only for setting up a grant in the FI\$Cal System?	A4: Yes for Wave 2. When applying for a grant, you can create the grant in the proposal phase as well.
Q5: When we are doing the proposal, we request numerous dollar figures. If some are not approved, can we just delete those or make adjustments to them?	A5: Yes, you can just delete them or make adjustments. Once a grant is generated, you will not be able to go back to the Proposal phase to make any adjustments. For future year grants, you can set them up in the System, but you cannot draw from them until the grant has been officially approved.
Q6: Are we able to put all three years' worth of funds for a grant?	A6: Yes, you can enter all of the grant information and dollar amount in the System. You can do this by changing the "End Date" line. You can only finalized the current fiscal year not for future fiscal year.
Q7: We have grants that run on the Federal fiscal year. Do we have to set up two grants, one for Federal and one for State fiscal year?	A7: You can set the grant up using the Federal fiscal year (Oct 1 to Sept 30). The dates will need to be within 6 months before the state fiscal year. FI\$Cal currently has no interface with the Federal government for grants



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Q8: Are there different account codes and indirect account codes? Do we have to lump them?	A8: Yes, there are different account codes in FI\$Cal. You record transactions by line item.
Q9: Can all projects be listed under one proposal?	A9: Yes, you can list multiple projects for one proposal.
Q10: What happens if we entered the wrong amount in the proposal, or the award amount is different from what is in the proposal?	A10: You can make changes or adjustments, or amend the customer contract and budget.