



FI\$Cal

Financial Information System for California

BUSN225c – Grants Employee Configuration Workshop

February 3, 2015

Agenda

- Department Configuration Workshop Objectives and Outcome
- Department Task Definitions
- Demonstration of Department Configuration Task Functionality
- Walkthrough of Department Configuration Task
- Next Steps

Configuration Workshop Objectives and Outcomes

Objectives:

- Define configuration values to support FI\$Cal Grants Employee functionality
- Produce configuration data entry spreadsheets for each configuration build work unit
- Validate configuration data entries with key business users, project management, and where applicable, department stakeholders

Outcome:

- Configuration build will be the basis for what configuration values will be loaded into the FI\$Cal system for Grants Employees.

**Configuration:
Set-up values within the application.**

Department Task Definitions

Term	Definition
Employee	Any employee belonging to the department who is eligible to be selected as a Principal Investigator on the Proposals submitted by the department. The employee has overall responsibility for the Award.
Principal Investigator (PI)	An individual who is ultimately responsible for the conduct of a project. This responsibility includes the intellectual conduct of the project, fiscal accountability, administrative organization, and the project's adherence to relevant policies and regulations. A Program Manager can be considered for this position
Reporting Structure	Represents the internal organizational entity (division, unit) to which the employee belongs

Walkthrough of Department Configuration Functionality

- **Employee – Professional Data** : Page used to capture professional information of new or existing employees. Required fields highlighted below:

Professional Data

Empl ID: 1000001 *Gender: Unknown *Personnel Status: Employee

General Info Find | View All First 1 of 1 Last

*Eff Date: 07/01/2014 *Mar Status: Single

Prefix: Name Suffix:

*Last Name: KUNISAWA Middle Name: Address

*First Name: MAKO Name: KUNISAWA,MAKO

Search/Match Data

First Name: MAKO Last Name: KUNISAWA

Country Info Find | View All First 1 of 1 Last

Country: USA *NID Type: PR National ID:

Citizenship Info. Find | View All First 1 of 1 Last

*Country: USA Citizenship Status:

Phone Info Find | View All First 1 of 1 Last

*Type: Business Phor Phone:

Email Info Find | View All First 1 of 1 Last

*Type: Business *Email: abc@xyz.com

Misc. Info Find | View All First 1 of 1 Last

*Eff Date: 01/01/1901 Rate Type: Regular

Howard Hughes Member Workflow Eligible Pre Award Administrator

Eligible PI Conflict of Interest Post Award Administrator

Walkthrough of Department Configuration Functionality

- **Employee – Job and Employment Data Page:** Store basic information about an employee's current job. Required fields highlighted below :

Job Data | Employment

Name: KUNISAWA,MAKO ID: 1000001

Employee Data Find | View All First 1 of 1 Last

Employee Status:	Active	Employee Classification:	Contractor
*Effective Date:	12/15/2014	Effective Sequence:	0
Action:	ADL Reason Code:	Action Date:	12/15/2014
Position Number:		Unit:	4170
*Reporting Structure:	41704000 State Long-Term Care Ombudsman		
Job Code:			
Location:			

- Note: Unit refers to the Business Unit of the Department to which the employee belongs

Walkthrough of Department Configuration Task

- Grants Employee Data

Employee ID	Effective Date	First Name	Last Name	Email	Business Unit	Reporting Structure
character	Date	character	character	character	character	character
11	10	30	30	70	5	10
						Enter a valid Reporting Structure ID
No	Yes	Yes	Yes	Yes	Yes	Yes
1000003	1/1/1901	OLSEN	JEAN	Jean.Olsen@fiscal.ca.gov	4170	3333300000

Note: If Employee ID is not furnished, we will derive it using the name and Email ID provided

Next Steps

- Complete Department Configuration Task in Workshop

Question and Answer



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