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

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Principal Investigator (PI)</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Reporting Structure</strong></td>
<td>Represents the internal organizational entity (division, unit) to which the employee belongs</td>
</tr>
</tbody>
</table>
Walkthrough of Department Configuration Functionality

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

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

  - Note: Unit refers to the Business Unit of the Department to which the employee belongs.
Walkthrough of Department Configuration Task

- Grants Employee Data

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Effective Date</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Business Unit</th>
<th>Reporting Structure</th>
</tr>
</thead>
<tbody>
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<td>character</td>
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<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<td>Yes</td>
</tr>
<tr>
<td>1000003</td>
<td>1/1/1901</td>
<td>OLSEN</td>
<td>JEAN</td>
<td><a href="mailto:Jean.Olsen@fiscal.ca.gov">Jean.Olsen@fiscal.ca.gov</a></td>
<td>4170</td>
<td>3333300000</td>
</tr>
</tbody>
</table>

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

FI$Cal Project Information:
http://www.fiscal.ca.gov/

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