



▶ STATEWIDE BUDGETING  
CHANGES ..... 1

○ ISSUE 7 | ○ VOLUME 2 | ○ JANUARY 2014



▶ LEADERSHIP MESSAGE ..... 2



▶ FISCAL TRAINING APPROACH ..... 2

# FISCal *Focus*

**FISCAL: TRANSPARENCY. ACCURACY. INTEGRITY.**

## STATEWIDE BUDGETING CHANGES

We are just a few months from Wave 1 go live, which includes preparation of the Governor's 2015-16 Budget. Departments that are part of Wave 1 will be using all of the functionality that Wave 1 offers. However, the effect of FISCal will reach well beyond those departments and will be experienced throughout the State sooner than you think. Because statewide budget functionality will be part of Wave 1, these changes affect all departments.

Wave 1 Departments are aware of the many changes to come. They have been working diligently with the FISCal Project to prepare. Over the next several months they will be introduced to the FISCal System, trained, and prepared to start working in the System on July 1.

### What does this mean for Non-Wave 1 Departments?

Departments that are not part of Wave 1 will experience changes in how their budgets are developed and will be provided training on how to implement those changes. Currently, some budget information is developed and submitted electronically. FISCal envisions that budget information, from all departments, will be submitted in the new chart of accounts structure, including renumbering of current program values. Most data will be submitted in an electronic format that the Department of Finance can load directly into the FISCal System. For example, Budget Change Proposals that are currently submitted in hard-copy, paper format will be developed in an electronic template that can be directly loaded into FISCal. The level of detail will be expanded to capture additional data required by FISCal. The same will be true for other budget documents. FISCal is currently

developing templates and departments will receive more information in a few months.

Over the next several months, please be on the lookout for communications and events from FISCal and Finance. At upcoming FISCal Forums, there will be presentations on Wave 1 budget functionality and the changing role of all departments. As Finance issues budget development instructions, the communications will include many FISCal-related changes. Instructions will be tailored to meet the specific needs of all departments, Wave 1 and Non-Wave 1.

This is an exciting time for FISCal. There will be many changes and challenges in the months to come as we prepare for Wave 1 go live. The FISCal Project is committed to working with our partners to ensure that we are providing necessary support to departments as we transition to and begin developing the State budget in the FISCal environment.

**SAVE THE DATE**  
**SAVE THE DATE**  
**FISCal Forum**

**Wednesday • January 29, 2014**  
**9:30 to 11:00 AM • East End Complex**  
**1500 Capitol Avenue • Sacramento**

*For more information, please contact our Change Management Office at [fiscal.cmo@fiscal.ca.gov](mailto:fiscal.cmo@fiscal.ca.gov).*

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# YESENIA'S PERSPECTIVE

*A Message From FI\$Cal Project Leadership*

In a blink of an eye the winter holiday season has embraced us. The year has quickly drawn to a close. I am delighted to have the opportunity to provide my perspective for the last edition of the FI\$Cal Focus for 2013. From where I sit, I am simply grateful.

As I step out onto the floor within the FI\$Cal building, or as I visit with Departments, I am grateful that:

- *The State of California is committed to transform how it manages financial information*
- *The FI\$Cal team and the Department experts come to work each day to bring their best thinking to the way the System will work*
- *Departments generously give precious time and attention to this huge effort*
- *Together we will make FI\$Cal a reality for the State and the citizens we strive to serve*

*"...to stay the course, to challenge our thinking, and change our business."*

This project is no small task. We are asking for great change to come to fruition. It will take all of us to get to the day when all of the Departments operate in an integrated financial management system. Each day that passes, we strive to build a stronger team and a stronger collaboration with our Partners, Departments, and stakeholders. The months ahead of us bring with it a lot of work, with a lot of opportunity to ready ourselves for operating in FI\$Cal on July 1.

Thank you for all that is being done to stay the course, to challenge our thinking, and change our business. We look forward to starting the new year with renewed energy and encouragement; with a focused intention to greet the summer with a Wave 1 go live.

To all who serve this great State with a commitment to the citizens of California, THANK YOU for all your support.

*Yesenia Reyes is Accenture's Change Management Lead*

## FI\$CAL'S TRAINING APPROACH

The FI\$Cal Training Approach provides an opportunity for end users to be trained to perform FI\$Cal transactions prior to go live. Each end user receives role-based training that provides them both the knowledge and skills they need to operate in the new System. End users learn new FI\$Cal concepts and terms along with the overall concepts of how the end-to-end transactions work in FI\$Cal. In addition, users gain an understanding of how their data transactions may have downstream effects on other users. End users acquire the skills needed to perform transactions in the System through hands-on training in class via guided practice exercises, and have the opportunity to practice real-life examples in user labs. Learners acquire skills in navigation, data entry, originating transactions, reviewing or updating existing records, performing approvals, and running FI\$Cal reports.

With Wave 1, the training approach will include the concept of Train-the-Trainer (TTT). The FI\$Cal Training Team will work with Department resources identified to be Trainers on the FI\$Cal system. TTT is a

leading practice on projects such as FI\$Cal. TTT allows for resources to become strong on-site resources for their department. TTT maximizes the department expertise that makes training resonate for new users. We are excited to begin working with departments on their Wave 1 training plans.

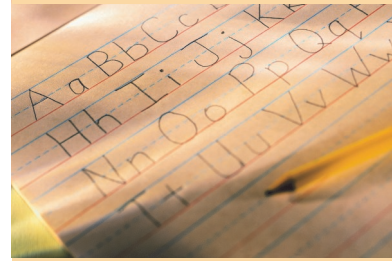
The following principles will guide the design, development, and implementation of End User Training:

- Provide end users with timely training and information sessions
- Apply learning-by-doing strategies
- Support end users with real life examples
- Support training with End User Support Labs

Wave 1 Department End User Training begins late April 2014. Departments will begin working on the details of their training deployment plans as the new year rolls in. Our journey from January to July now focuses on testing the System and training in the System in preparation to go live.

## GLOSSARY

*This section features acronyms or definitions for the FI\$Cal Project. For a list of additional terms, please visit our website at [www.fiscal.ca.gov](http://www.fiscal.ca.gov).*



### **Chart of Accounts (COA):**

The foundation to any ERP. It provides each business unit, project/grant, and account with a unique identification number.

**End Users:** Individuals who will use or be impacted by FI\$Cal.

**Go Live:** When end users will begin using the FI\$Cal System.

### **Subject Matter Expert (SME):**

A Subject Matter Expert is an individual who has deep business knowledge or understands the intricacies of a particular business process. It is most commonly used to describe the people who explain the current process to IT and then answer their questions as they try to build a technology system to automate or streamline the process.

**Train-the-Trainer:** A method of training delivery that engages and equips department resources to be trainers for an end user population.

### **User Support Labs:**

Training labs where users will be able to bring in real-life examples and get support as they perform the transaction in the practice environment.



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Any questions, please contact us at: [fiscal.cmo@fiscal.ca.gov](mailto:fiscal.cmo@fiscal.ca.gov)