



One state. One system.

2017 Release Training Deployment Kickoff



Agenda

- Welcome
- Introductions
- Transition
- Release 2017 Overview
- Training
- Training Liaison Role
- Training Tasks
- User Support Labs
- Next Steps

3/28/2017

Purpose

To provide the Training Liaisons with relevant and timely information as we work together work to support the learner.

Introduction

- Destination Exercise

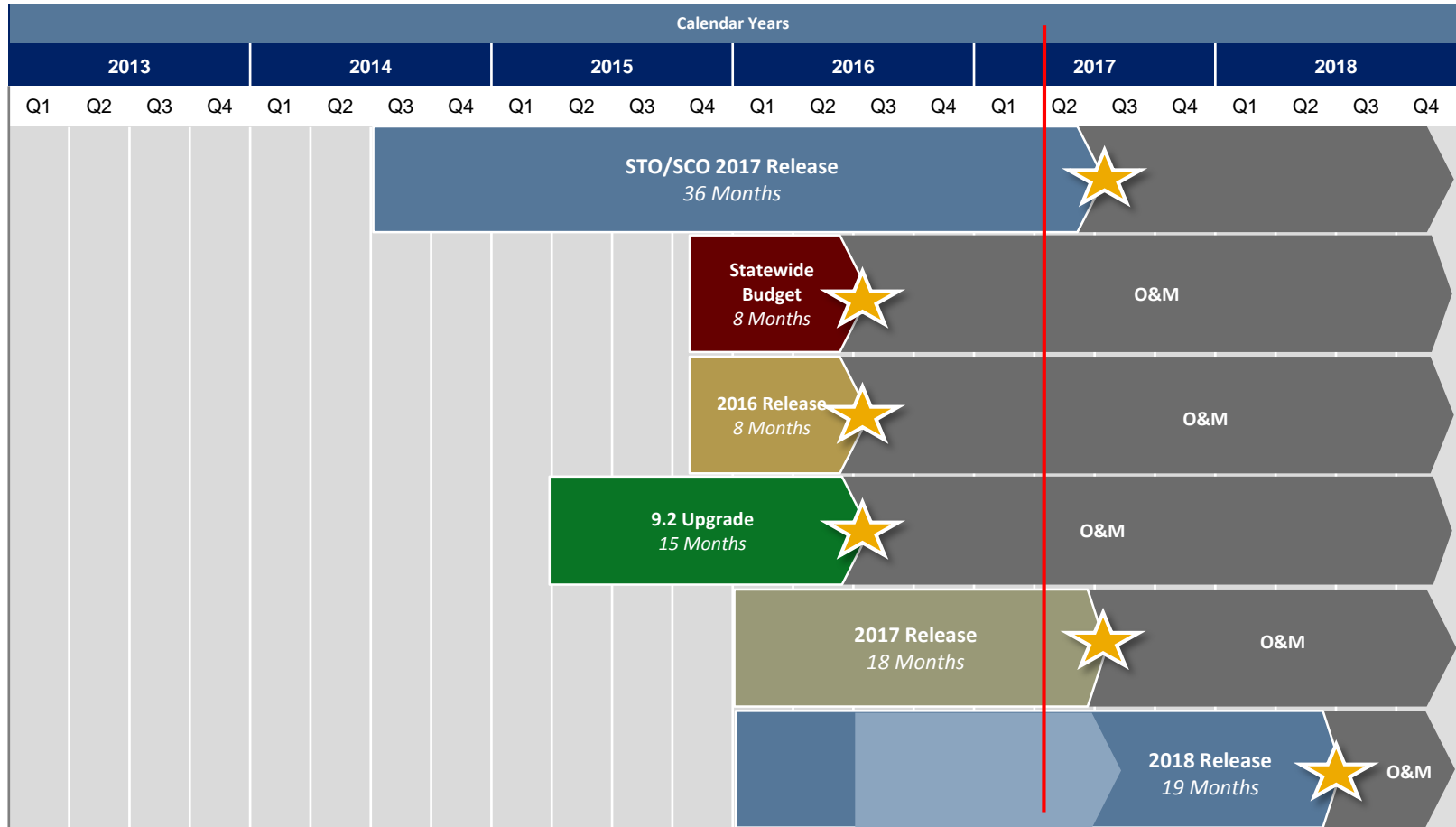
March 20, 2017



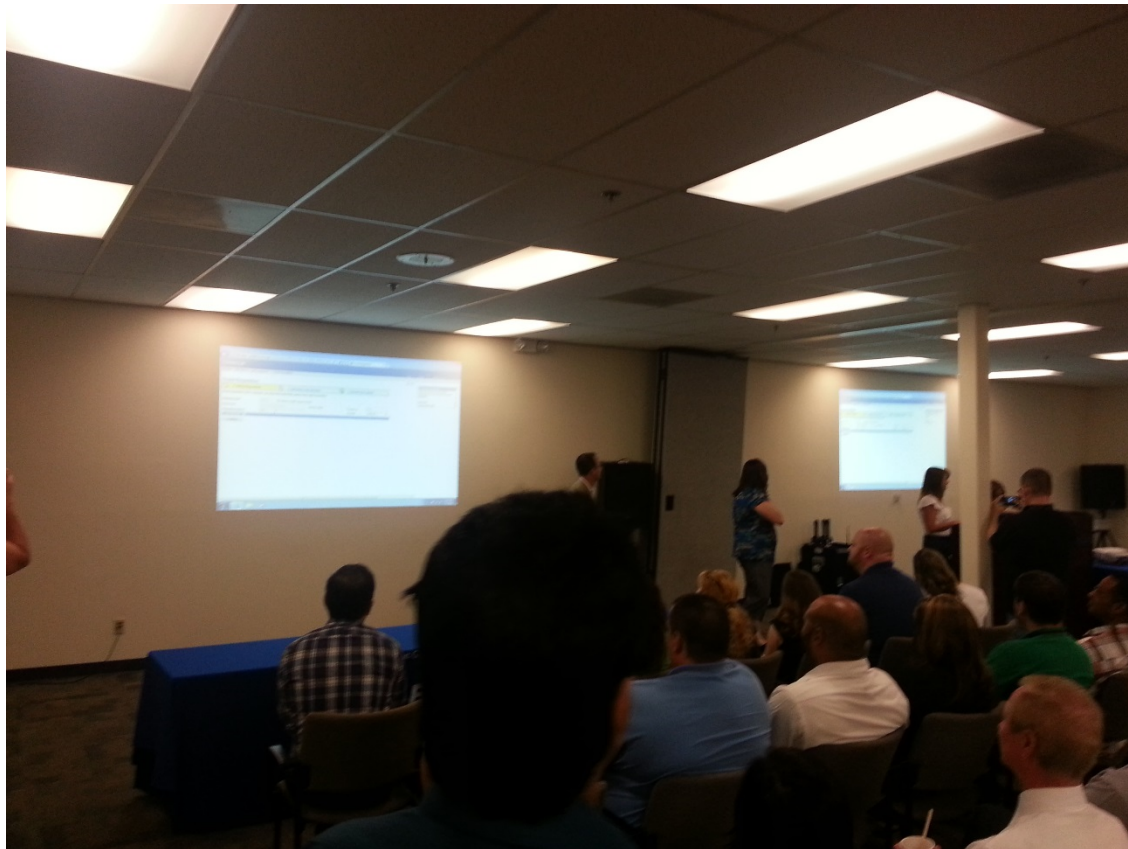
Transition Person

- Show Video

2017/2018 Release Timeline



First FI\$Cal Transaction



Key Wave Activities

- Pre-Wave
 - Went live in July 2013 with participation from five departments and two boards and commissions
 - Key implementation activities included delivering requisition, purchase order (PO), and receiving functionality, and establishing the Vendor Management File (VMF) to support the requisition and PO functionality in Pre-Wave
- Wave 1
 - Went live in July 2014
 - FI\$Cal became the primary accounting, procurement, and budgeting system for Pre-Wave and Wave 1 departments using the new FI\$Cal Chart of Accounts (COA)
 - FI\$Cal became the system of record for budget data for DOF

Key Wave Activities

- Wave 2
 - Went live in August 2015
 - BidSync retired, leading to statewide use of FI\$Cal to:
 - Search for small business (SB) vendors, disabled veteran business enterprise (DVBE) vendors, and leveraged procurement agreements
 - Advertise contract solicitations
 - Push an advertisement link to registered bidders based on specific commodity codes
 - Post to FI\$Cal notices of intent to award and the award of contracts
 - Vendor records for all departments, including deferred and exempt departments, integrated into the statewide Vendor Management File (VMF)
 - FI\$Cal becomes the Procurement System of Record
 - Statewide control functions for DGS deployed

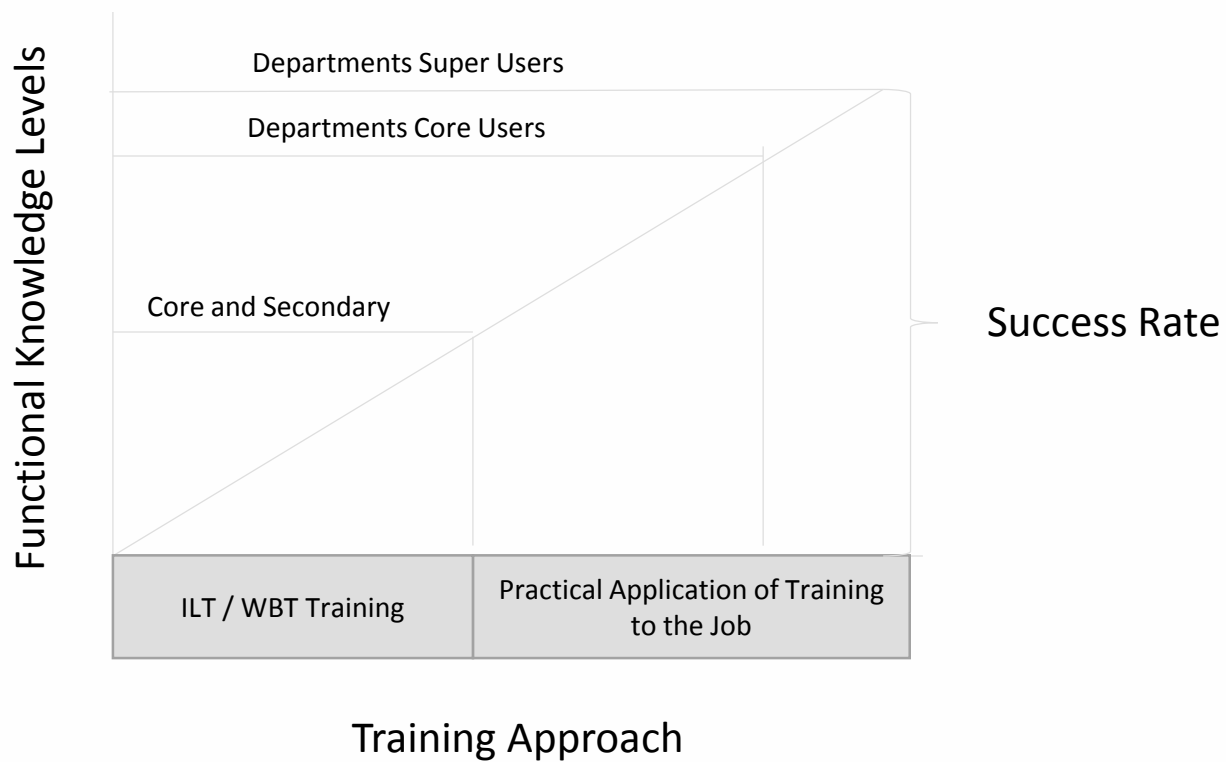
Key Wave Activities

- 2016 Release
 - Went live in July, 2016
 - Expanded the proven functionality to 6 departments and three business units
 - Integration between in-scope departments, FI\$Cal, and partner agencies
 - PeopleSoft Upgrade 9.2
- 2017 Release STO/SCO
 - Scheduled to go live in July 2017
 - Core accounting and cash management functionality rolled out
 - FI\$Cal as the General Ledger Book of Record, and cash management control functions
 - Statewide control functions for SCO and STO deployed

Key Wave Activities

- 2017 and 2018 Release
 - Scheduled to go live in July 2017 and July 2018
 - Expands the proven functionality to all remaining departments
 - Fully completes integration between in-scope departments, FI\$Cal, and partner agencies

Training Path



Training Delivery Types

1. Web-based Training (WBT) Provides self-paced hands-on experience through simulated FI\$Cal transactions
2. Instructor - led Training (ILT) – Provides hands-on experience through simulated FI\$Cal transactions with an ability to interact with an instructor and fellow students.
3. Virtual ILT Training (VILT)– Provides virtual hands – on experience with an ability to interact with an instructor and fellow students.

Advantages to WBT

- Self-paced
- Flexible schedule
- Reduce workload constraints
- Rapid deployment across geographically dispersed learning populations
- Reduced travel expenses
- Reduced need for facilities

Advantages to ILT

- Ability to interact and ask questions with an instructor
- Ability to interact with fellow students to gain new knowledge
- Potentially learn new information not yet updated in existing training material
- Some students prefer the formal classroom structure

Department Training Liaisons

Training Liaisons have a crucial role in the 2017 Release Training Deployment. As such, they will be granted access to certain FTA administrative functions to:

- Determine Department's end-user training progress
- Along with learners, can enroll, reschedule, or cancel training for learners

TECH730A

Role Mapping document that identified users
and their FI\$Cal roles

2124

**Total Number of Release 2017 End
Users as of 3/21/2017**

28 Departments

Training Hub Locations

Sacramento

- ISInc 2554 Millcreek Drive
- 300 Capitol Mall

Los Angeles

- 100 South Main Street

Oakland

- 111 Grand Ave

Fresno

- 1352 W. Olive Ave

ILTs

Sacramento

- 5/2 – 7/20

Los Angeles

- 6/12-16
- 6/26-30

Oakland

- 5/22-26

Fresno

- 5/15-18

2017 Training Release:

- Train Deployment Kickoff Meeting: March 24, 2017
- Register End Users for FI\$Cal Training: April 6, 2017
 - Core Users Have 2 Weeks Priority Registration for ILT sessions
 - Secondary Users Can Register Starting April 21, 2017
- Training Release Deployment: May 2, 2017

Training MDW Task Overview

- FI\$Cal will release a series of training tasks that will help prepare your department and FI\$Cal for FI\$Cal end-user training
 - These tasks document the key activities necessary to prepare departments for end-user training
 - Will review these tasks and provide a completion timeline
- Training Liaisons will ultimately be responsible for the completion of Training MDW tasks

Training Tasks

TRNG705	Training	Register End Users for FI\$Cal Training	Register department end users for FI\$Cal end user training.	04/06/17	06/30/17
TRNG706	Training	Attend FI\$Cal Training	Identified department end users attend FI\$Cal end-user training based on their assigned FI\$Cal end-user role assignments.	05/02/17	06/30/17
TRNG707	Training	Manage Core End-User Training Participation	Training Liaison manages department participation in core FI\$Cal end-user training. FI\$Cal provides Training Liaison with recurring training reports.	05/02/17	06/30/17
TRNG708	Training	Participate in Weekly Training Support Calls	Participate in a weekly call to obtain support for end-user training registration and provide updates on the status of training completion.	04/10/17	06/26/17
TRNG710	Training	Register End Users for Training User Support Labs	Register department end users for Training User Support Labs to obtain hands-on support in performing transactions directly in FI\$Cal	06/19/17	08/04/17
TRNG711	Training	Attend Training-Secondary Delivery	Identified department end users attend secondary delivery sessions of FI\$Cal end-user training based on their assigned FI\$Cal end-user role assignments.	04/24/17	07/21/17
TRNG713	Training	Attend Training User Support Labs (USL)	Identified department end users attend User Support Labs (USLs) to obtain hands-on support in performing transactions directly in FI\$Cal	07/24/17	08/31/17

FI\$Cal Training Academy



FI\$Cal Training Academy

Registration

- FI\$Cal Training Academy demo

Training Liaison Admin

- Demo

User Support Labs

- Starts July 24, 2017
- One department (1) Super User (Super User **is required** to attend and must have completed the required training)
- Up to three (3) additional end users who have ***completed the required training***
- **Note:** Required training must be completed for each USL participant prior to submitting the USL Request Form

Next Steps

- What are some of the practical, concrete items we can do to help the learner complete their training?



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Questions and Answers
FI\$Cal Project Information:

<http://www.fiscal.ca.gov/>

Or e-mail the FI\$Cal
Project Team at:

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