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Working smarter & connected

California's financial management system

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User Community Forum

May 18, 2016

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Michael Muth

FI$Cal Communications Manager

Agenda

- Project Status
- Upcoming Training
- Tips & Tricks: Access Management
- FI$Cal Service Center – *What we've heard from you*
- Close

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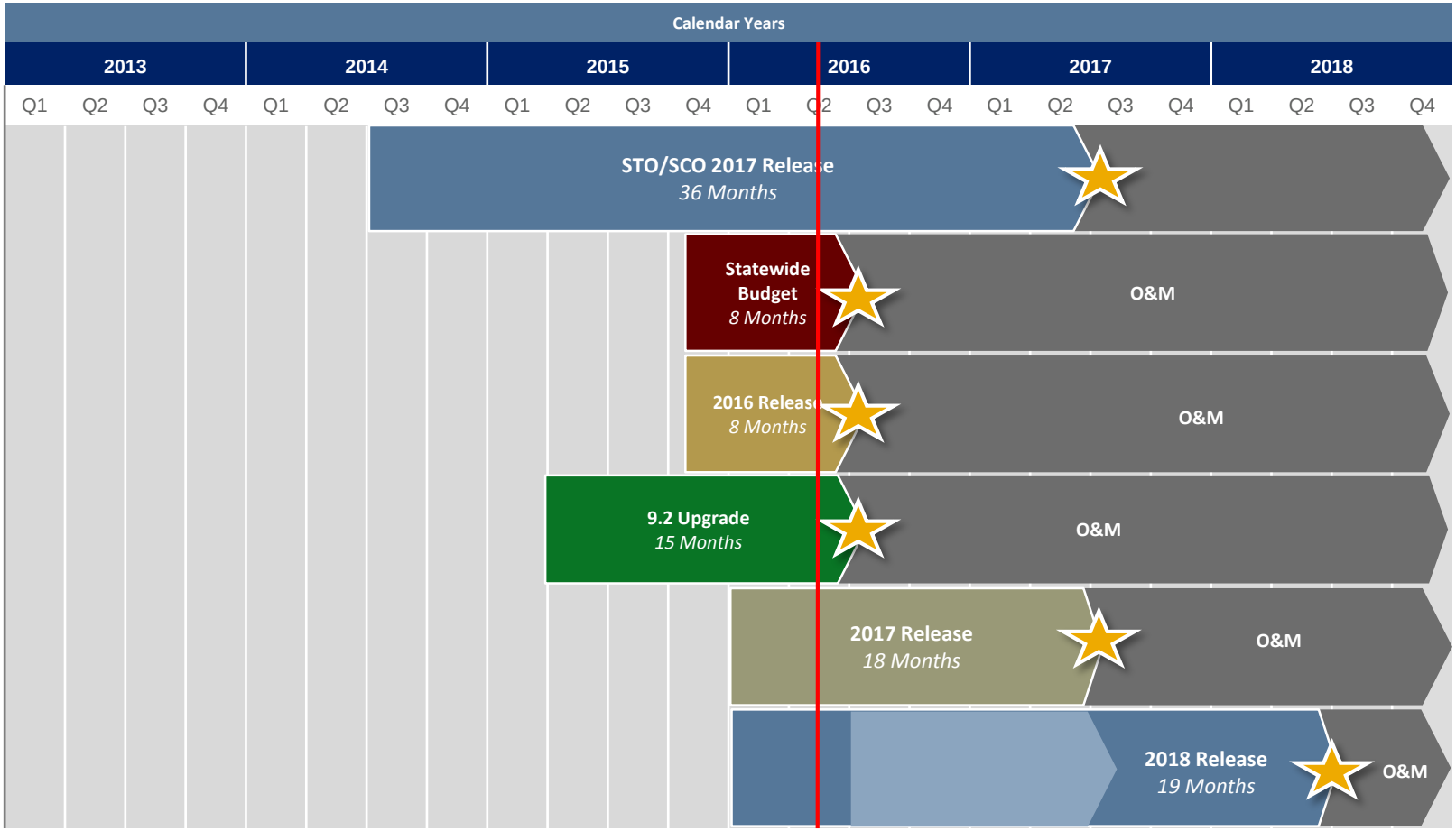

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2016 Release Training

- Registration began May 9, 2016
- Training for 2016 Release Departments June 7 - July 29, 2016
- Statewide Budget Training (Hyperion) Begins week of June 13, 2016
- Training Hubs are located in Sacramento and Los Angeles
- User Support Labs begin August 2016

FI$Cal Upgrade Release 2016

- Delta Workshops to be facilitated on May 17 and 19, 2016
- Updated training materials will be uploaded to the FI$Cal Training Academy
  - New topics due to additional functionality
  - Existing topics that were re-recorded due to major changes

Eric Harrald

FI$Cal Information Security Officer (ISO)

TIPS & TRICKS FOR A SUCCESSFUL MARF AND UARF SUBMISSION

WHAT IS THE MARF?

- MARF is the Multi-User Access Request Form
- Used to request roles for more than one user at a time, hence the title, Multi-User Access Request Form
- As departments come on board to FI$Cal, the MARF is the most commonly used document
- Can be accessed at:

http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/MARF20151208.xlsm

WHAT IS THE UARF?

- UARF is the User Access Request Form designed to request roles for one individual User at a time.
- Can be accessed at:

http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/User_Access_Request_Form_V010815.xlsm

TASKS TO ACCOMPLISH PRIOR TO SUBMISSION OF MARF/UARF

- You must have a Departmental Authority/Designee (DAD) on file with FI$Cal.
- You must know what roles your users need prior to completing the MARF or UARF
- Refer to the FAQ and User Role Description Handbook below:

http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/User_Access_Request_FAQs_Feb_2016.pdf

http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/FISCalEnd-UserRoleDescriptionHandbook2.2.pdf

END USER
ROLE DESCRIPTION HANDBOOK

- The FI$Cal End-User Role Description Handbook is designed to assist departments in completing the role-mapping task and ongoing maintenance of role assignments.
- Role mapping is the process of mapping end users to the appropriate FI$Cal end-user roles required to complete their daily work activities for FI$Cal.
- The Handbook also helps departments understand the FI$Cal access that each role provides. For each FI$Cal end-user role, the Handbook provides:
  1. Role description and role responsibilities
  2. List of related FI$Cal business processes
  3. Description of the relation to other roles

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TIPS FOR A SUCCESSFUL MARF/UARF SUBMISSION

- Have an approved Departmental Authority and/or Designee on file
- Submit an accurate and complete MARF/UARF. Frequent errors include incorrect email addresses and Business Unit (BU) information and workflow
- Ensure that the MARF/UARF is transmitted from the Authority or Designee's email address on file with the FSC

Wes Riley

Assistant Deputy Director, FI$Cal Service Center

What We've Heard from You

"Tickets are taking too long"

- We agree
- So we are growing the capacity of the FI$Cal Service Center
  - Many new staff to better serve you
  - More on-site L1 staff
  - Phone calls will only roll offshore during off-hours
- Role Additions and Requests are Faster

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What We've Heard from You

Customer Service Survey Too Lengthy

- Reducing Survey from 11 to 3 questions:
  - Was your issue resolved by the FI$Cal Service Center representative?
  - Overall, I was satisfied with the service I received: (1-5 scale)
  - Comments?
- Implementation Delayed

What We've Heard from You

- Why can't you see what I see?
- Coming Soon: Screen Sharing
  - WebEx
  - Implementation in Progress

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Your Feedback is Valuable!

- Customer Satisfaction Survey Metrics Last 90 Days (2/10/16 – 05/10/16)
- 238 responses from 2844 survey invitations sent
- Response rate 8.44%

Was your issue resolved by the FI$Cal Service Center representative?
(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Yes	184		77%
No	54		23%
Total Responses: 238		0% 20% 40% 60% 80%	

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What We've Heard from You

- Overall Satisfaction Rate **4.0**

Overall, I was satisfied with the service I received.
(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Strongly Agree 5	84		35%
Agree 4	72		30%
Neither Agree or Disagree 3	34		14%
Disagree 2	27		11%
Strongly Disagree 1	21		9%
Total Responses: 238		0% 20% 40% 60% 80%	

Access FI$Cal Page Upgrades

- New additions:
  - New How-To videos (Access FSC)
  - Known Issues
  - Maintenance Schedule and Outages
  - **Location**: http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/index.html

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Access FI$Cal

Welcome to Access FI$Cal. This page provides you with access to the FI$Cal System, maintenance information, access to training, and access to the FI$Cal Service Center.

Access the FI$Cal application.

Access FI$Cal Service Center Information.

Access the FI$Cal Training Academy.

Access application maintenance notices.

Access to release notes.

Outage Notification:

Select Maintenance button below to view upcoming outages.

Known Issues:

All PeopleSoft data integrity errors and related issues have been resolved. The FI$Cal Production PeopleSoft environment has been fully restored.

Important Information:

For information on bidder and supplier activities, please use Cal eProcure (https://caleprocure.ca.gov). Cal eProcure is the new vendor portal that will replace BidSync.

FI$Cal Release Notes:

FI$Cal System release notes on issues impacting end users are now posted online.

Encumbrance Only PO Update

- DOF has updated the State Administrative Manual (SAM)
- There are two existing Job Aids that are currently being reviewed for updates:
  - Job Aid 264: When to Use the Encumbrance Only acquisition type
  - Job Aid 263: How to Create an Encumbrance Only PO

FSC Mailbox

fiscalservicecenter@fiscal.ca.gov

- Used to create or update tickets.
- Not used for contacting FSC management
- Do not CC this mailbox; a ticket will be created if you do

Questions