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California's financial
management system





One state. One system.

User Community Forum

May 18, 2016





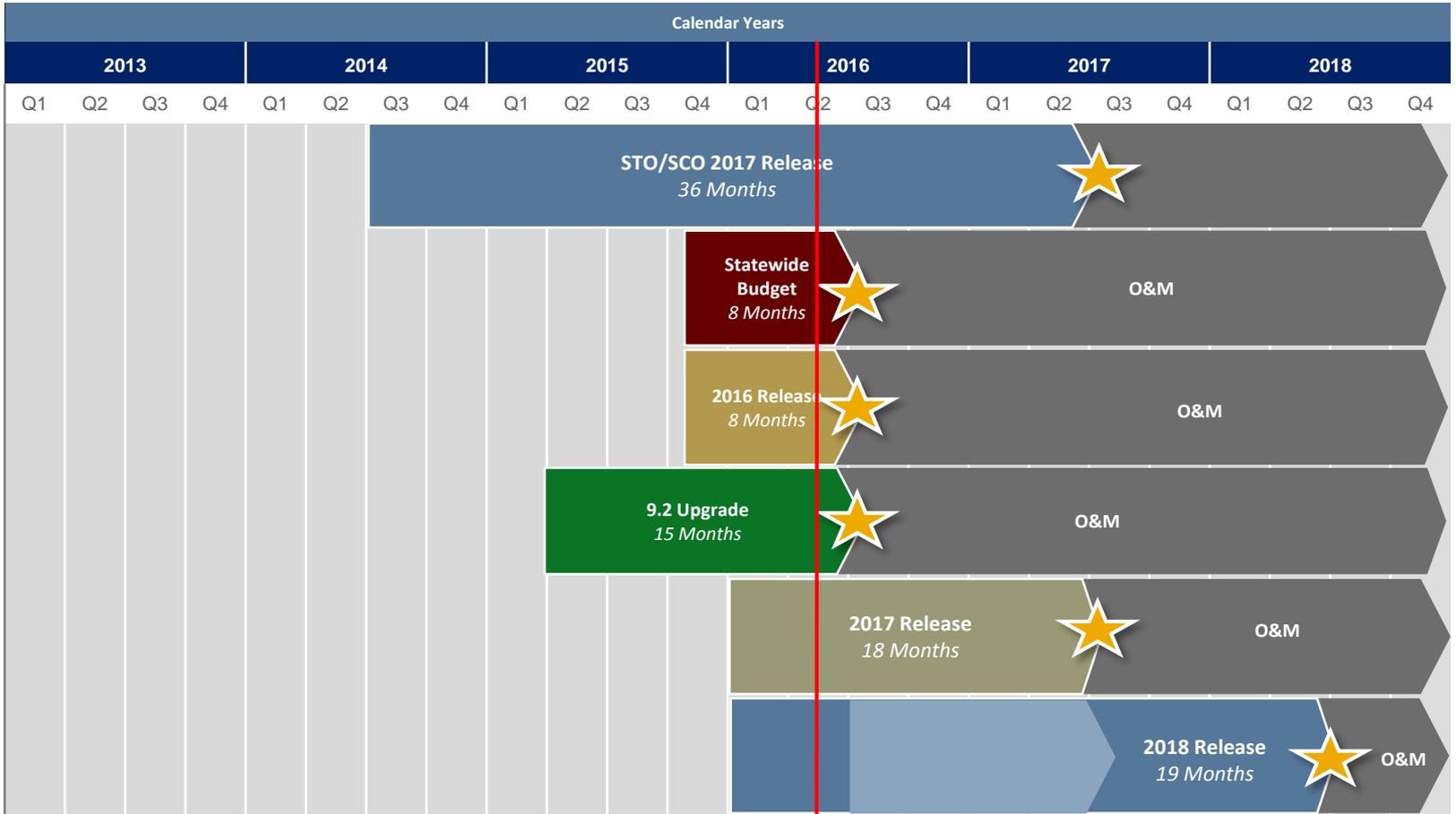
Michael Muth

FI\$Cal Communications Manager



Agenda

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



2016 Release Training

- Registration began May 9, 2016
- Training for 2016 Release Departments June 7 - July 29, 2016
- Weekly training calls
- 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

- For departments in Production
- Delta Workshops for super users on May 17 and 19, 2016
- Updated training materials uploaded to the FI\$Cal Training Academy (FTA)
 - New topics on additional functionality
 - Existing topics with changes re-recorded

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

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

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

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			



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			

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



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

