FI$CAL FORUM

DATE: WEDNESDAY, JULY 19, 2017
TIME: 1:00 PM TO 3:00 PM
LOCATION: DGS, 3RD STREET, WEST SACRAMENTO, CA

Facilitators:	Will Padilla Susan Sudmann Raymond Esquer Maureen Rielley
Meeting Purpose: **Type of Meeting:**	FI$Cal User Community Forum Question and Answer

AGENDA TOPICS/MINUTES

#	Topic	Presenter	Duration
1	Introduction – Project Update, Procurement, On-Site Support Team, & FSC	Will Padilla	**5 min.**
2	Cal eProcure – Improvements, Simplified Registration, & Enhancements	Susan Sudmann	**27 min.**
3	On-Site Support – Incident Pathway	Raymond Esquer	**25 min.**
4	FI$Cal Service Center – Process Enhancements & Updates	Maureen Rielley	**20 min.**

QUESTIONS AND ANSWERS

Question	Answer
Q1) Going forward, will there be a process established within FI$Cal which will allow vendors to update their information through Cal eProcure?	A1) As of right now, vendors should be able to log in and change/update some vendor information. There is however, some information that is locked and cannot be changed due to its downstream impacts.
Q2) Is there a way for 2018 departments to compare the vendors within FI$Cal to the vendors that the departments currently have on file?	A2) Yes, the departments would have to contact FSC to get in touch with the Vendor Management Group which can assist in pulling such information.
Q3) Can new employees who have just on boarded at previous department waves, attend the 2018 Kickoff meetings in order to receive relevant information regarding the FI$Cal System?	A3) Although we had not anticipated previous waves attending the 2018 Kickoff meetings, we'd be happy to include you as long you reach out to the CMO mailbox.
Q4) Do you need DAD approval in order to access the University of FI$Cal (UF)?	A4) Yes, UF access will only be granted to those users who will be transacting within the system. After go live FI$Cal departments will receive UF access at the same time they request their FI$Cal application access. On the other hand, all future release, exempt, and deferred departments will receive UF access closer to go live. Additionally, we do currently offer statewide procurement and SCO/STO training online, which does not require FTA access.

Question	Answer
Q5) Will the onboarding training be mostly web based or instructor lead?	A5) Onboarding training will be a combination of both web based and instructor lead.
Q6) Can a department DAD submit roles on behalf of him/herself?	A6) No, in order for a DAD to receive the desired roles that he/she wishes, the role mapping needs to be submitted by another department DAD – a DAD cannot provision roles for him/herself.
Q7) How do I navigate to the annual payment report within FI$Cal?	A7) We are currently reaching out to the training team to create job aids that will assist users in navigating to the annual payment reports.
Q8) Does a department need to have AT&T in order to use AT&T Connect?	A8) No, FI$Cal will schedule an invite on your calendar and a link will be provided which will download AT&T Connect onto your computer.
Q9) Is it possible to have three-way sharing capabilities that includes the department, on-site support staff, and the customer all on one screen sharing platform?	A9) Yes, a conference invite could be sent to multiple users in which each user will then be able to have screen sharing capabilities. With that being said, we would recommend that all parties are aware of sensitive information that they may be showing and to take security precautions if needed.
Q10) What's the purpose of the FI$Cal deployment support?	A10) The FI$Cal deployment support was designed to deploy FI$Cal resources to those departments that require additional training and support. Additionally, its intent is to aid those departments who are stationed outside of the greater Sacramento region – specifically those departments located in Southern California and coastal regions.
Q11) Will there be more job aids available for Service Now and Identity Self-Service?	A11) Yes, we plan on rolling out better information, tools, job aids, and videos in regards to Identity Self-Service and Service Now in the near future. Our current focus at the time is helping those departments who have recently gone live, but departments can expect this roll out to occur within the coming month.
Q12) How can we determine if all ticketed information has been successfully cross walked from ITSM to Service Now?	A12) We can ensure that all relevant information has been copied over into Service Now. If for some reason there was some information missing about a specific ticket or tickets, we suggest relaying that information to FSC.
Q13) Should departments bring on more staff to assist with the Level 0 support – Level 0 being the departmental end users?	A13) This is something that the departments themselves should consider and not FI$Cal. We do recommend that all departmental Super Users network with one another in order to streamline efficiencies that other department users may be struggling with.
Q14) Will Super User Forums continue throughout the year?	A14) Yes, Super User Forums will continue to be held throughout the year and all are welcome to join.

Question	Answer
Q15) Has the 90 days of inactivity rule gone into effect?	A15) Yes, ISO will disable user's roles after 90 days of inactivity.
Q16) Will FI$Cal send out a report containing all of the departments Super Users and their respective roles?	A16) Yes, this report usually goes out automatically to all departments every year or a department DAD can request the report at any time.
Q17) How does a department user gain access to Service Now?	A17) We request that users reach out to FSC regarding getting Service Now access. Please see the link below. https://accentureplc.service-now.com/clientportal/logout_success.do
Q18) This question relates to the validity of queries. Currently we use reports that are "locked" and represent the true finished product for the month. They are sent out to Fund Admins and can be tracked. As a Fund Admin, if we receive an Excel spreadsheet that was queried out of FI$Cal, how do we trust that it's final and valid? We're currently a 2018 department but receive FI$Cal queries & reports from our shared fund users.	A18) FI$Cal has Reporting and Query functions. Where Reports are in a more locked down or PDF format in most instances, Queries are generally output to Excel and are commonly used when flexibility is needed for data extraction. If you are receiving Queries from outside sources, I would recommend that you have them signed off by the submitted as a "True and Accurate" representation of the information submitted and ask for a source of the Query information (i.e. Tables, run parameters, etc.). This would give you more confidence in the validity of the information being provided.
Q19) How does a department remit cash receipts (check and money order) to the bank and STO when the EDF will no longer be used during the FFY18-19?	A19) Once SCO/STO go live, there will be numerous job aids made available to all departments that will clearly reiterate the changes in functionalities and how those changes will affect those departments in FI$Cal and outside of FI$Cal.