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# User Community Forum

July 2017





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# Will Padilla

FI\$Cal Change Management Office

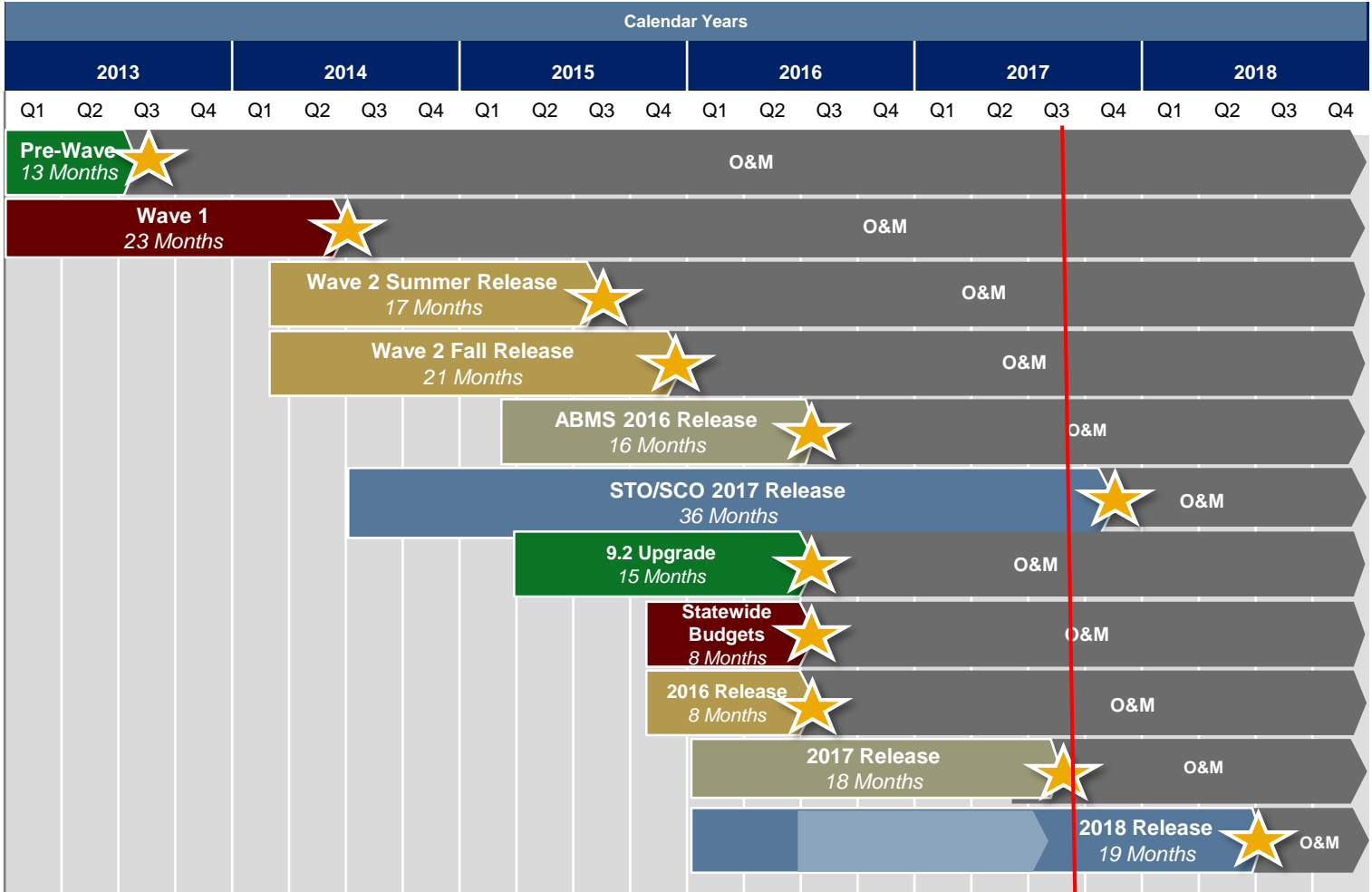
July 2017

# Agenda

- Project Update
- Procurement
- On-Site Support Team
- FI\$Cal Service Center
- Close



## FI\$Cal Deployment Timeline





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# Susan Sudmann

FI\$Cal - DGS

July 2017

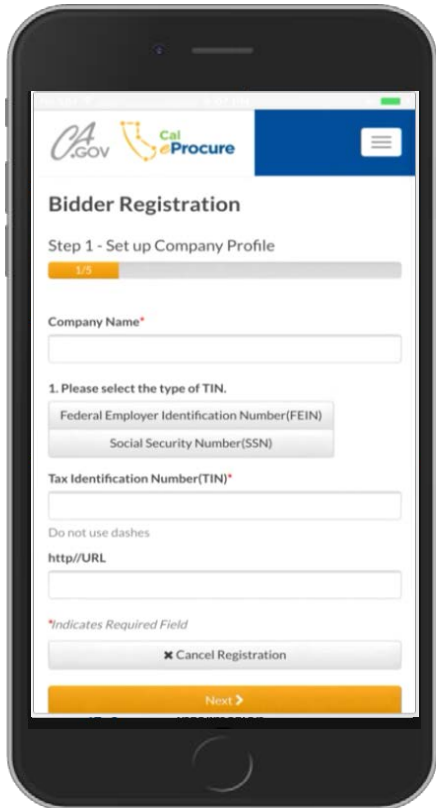
# Cal eProcure

- Public facing portal
  - Search for bidding opportunities in CSCR
  - SB/DVBE search
  - Leveraged Procurement Agreements (LPA) search
  - SB/DVBE certification
  - Bidder/supplier registration

# Recent Improvements

- Bidder Registration
- California States Contracts Register (CSCR) event Notifications driven by UNSPSC and Service Area
- More information in Event Header
- Simplified CSCR search

# Simplified Bidder Registration



The image shows a smartphone screen displaying the 'Bidder Registration' form. The form is titled 'Bidder Registration' and is part of 'Step 1 - Set up Company Profile'. It includes a progress bar showing '1/5' steps. The form fields are: 'Company Name\*' (required), '1. Please select the type of TIN.' with radio buttons for 'Federal Employer Identification Number (FEIN)' and 'Social Security Number (SSN)', 'Tax Identification Number (TIN)\*' (required) with a note 'Do not use dashes', and 'http://URL'. At the bottom, there is a 'Cancel Registration' button and a 'Next >' button.

Reduced the number of steps from seven to five

Ability to identify multiple email recipients for notifications

Updated the text to provide improved direction

Ability to identify service areas to drive notifications



# Enhanced California State Contracts Register (CSCR)

- Bid events can be shared by email or by URL
- Additional details are included in the event header
- Searching for bid events has been simplified
- Advanced search for bid events has more parameters

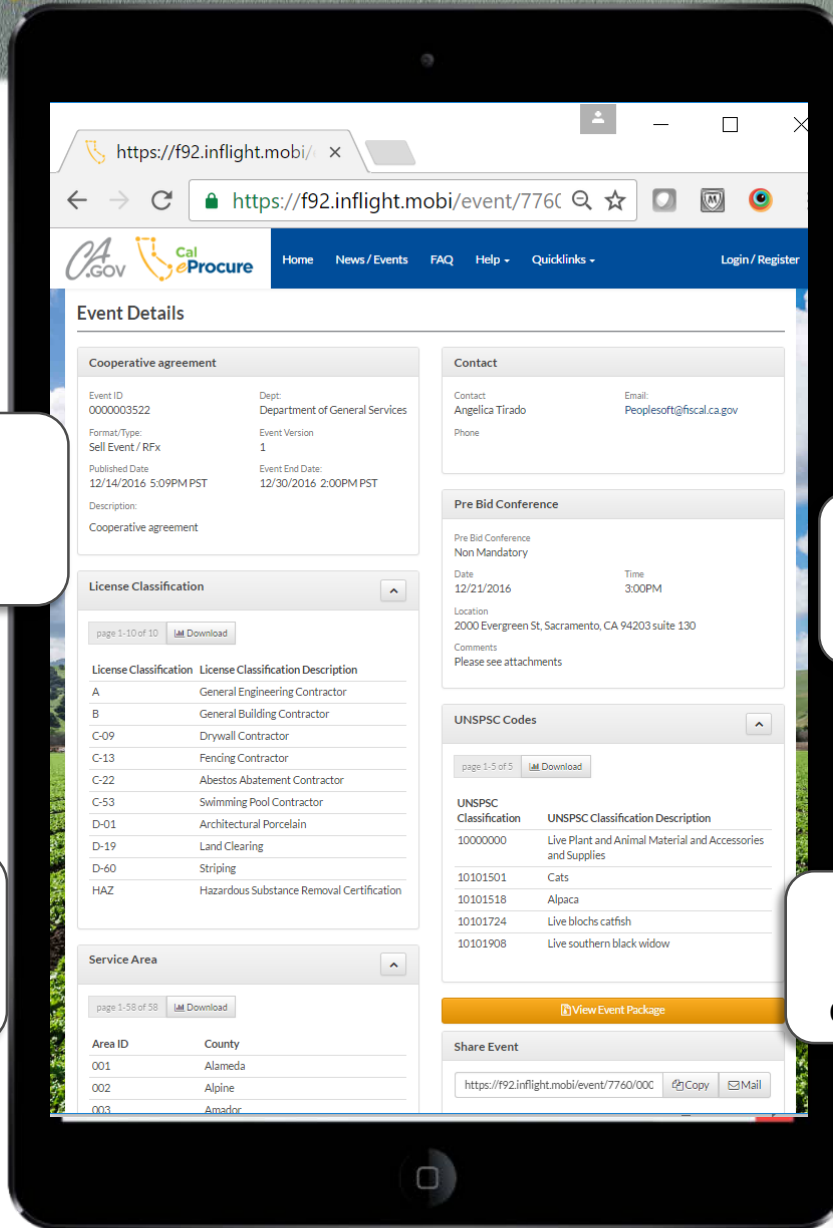
## Bid Event Details

License Classifications

Applicable service areas

Pre Bid Conference details

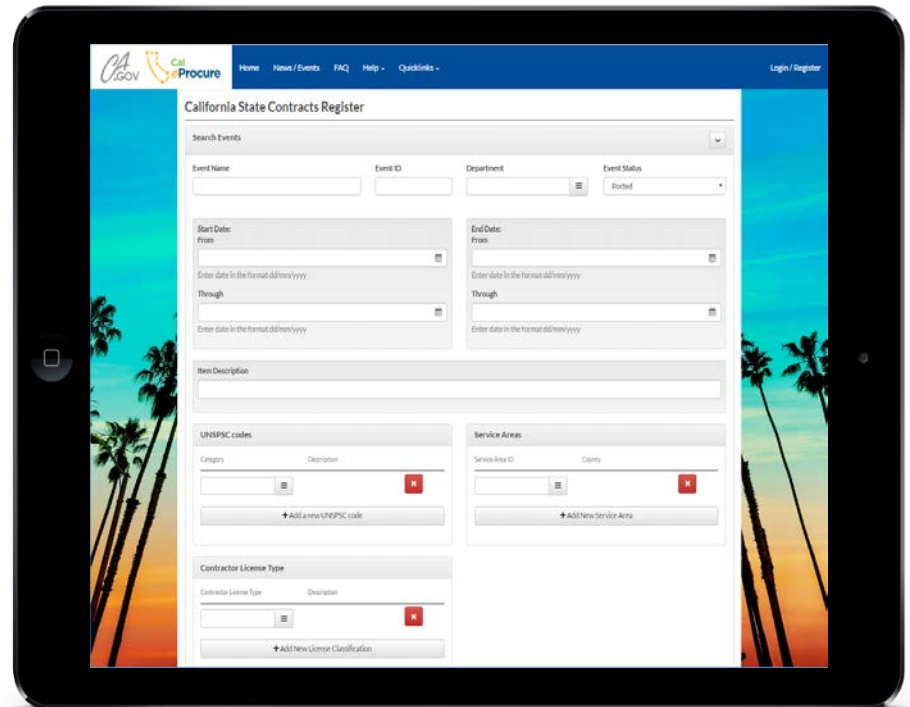
Email the Bid Event URL or copy and share



# More Filters for CSCR Advanced Search

Added the ability to  
Search by:

- Service Areas
- Contractor License Type



## Procurement related enhancements

- Changes to SCPRS entry page
- Changes to SCPRS public search
- Enhancements to how OSDS communicates with SB/DVBEs





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# Raymond Esquer

Business Operations and Solutions Division

July 2017

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## On-Site Support Office Levels of Support

July 12, 2017



## On-Site Support Office (OSSO):

- Created to provide additional resources to departments for the resolution of incidents that require cross-team collaboration or direct support.
  - Assist departments with the resolution of Month End / Year End Close incidents
  - Departmental Support for FI\$Cal users
    - ❖ Transactional and business process support through User Support Labs
    - ❖ Support to departments that are having reoccurring problems in using FI\$Cal modules for day to day processes
    - ❖ On-going consulting and education for incident resolution in the areas of:
      1. Role mapping and Workflow
      2. Configuration



## On-Site Support – Procurement Section

- On-Site Support Procurement section will provide support to departments in the resolution of issue related to system navigation and system functionality in sub-modules for Requisition, Purchase Order, Sourcing, Procurement Contracts and Receiving.
- Support will include assisting users in identifying issues with role mapping and approval workflow for Procurement functionality to resolve incidents created through Service Now.
- Staff in the Procurement section will be trained in the FI\$Cal Requisition to Check sub-modules, and will work toward identifying common errors and tips for transacting in FI\$Cal.



## On-Site Support – Accounting Section

- The On-Site Support Accounting Section will provide support to departments in resolving incidents submitted that require cross-team collaboration. Support will include examining system functionality, configuration, and processes in sub-modules (accounts payable, accounts receivable, commitment control, allocation and general ledger).
- The Section develops documentation on common errors, reviews and improves current documented processes, and reports on departmental Month-End-Close/Year-End-Close status.
- The Section facilitates resolution of incidents relating to MEC/YEC with other FI\$Cal Work units, partner agencies, and consultants.

## On-Site Support – MEC/YEC Section

- The On-Site Support MEC/YEC Section provides support to departments for incidents related to MEC/YEC. Support will include assisting departments with extracting data for analysis in the preparation of monthly and annual closing activities, system module reconciliations, and interfaces between the FI\$Cal system and departmental legacy systems.
- The Section will provide departments with technical and analytical assistance for data extraction and incident resolution for the MEC/YEC process.
- The Section will perform analysis using SQL Developer and PeopleSoft Query tools to identify FI\$Cal System and Sub-Module transactional errors.

## On-Site Support Options



### Option 1

FSC Incident- Incident Resolution



### Option 2

AT&T Connect –Online Meeting Tool



### Option 3

User Support Lab



### Option 4

Deployment Support



## Description

End User creates incident through the FI\$Cal Service Center (FSC). FSC L1 routes ticket to On-Site Support Office Que for resolution. Tickets that are related to Month End Close / Year End Close, or that may require cross-team collaboration will be routed to the OSSO for resolution. OSSO staff will reach out to users for clarification and follow up.

## Objective(s)

- Tickets submitted to the FSC are resolved by On-Site Support Office via Service Now system.
- Ticket resolution, transaction processing, and assisting with MEC/YEC close request.
- User Interaction via Email or Phone with On-Site Support Office.





## Description

If level 1 does not meet the users need, or the issue is too complex for phone or email resolution, AT&T Connect is available.

AT&T Connect is an Online Meeting Tool. An interactive and collaborative tool combining audio conferencing and data sharing. The tool enables On-Site Support to see the client's screen and help departments navigate through the system, and provide solutions to their questions.

## Objective(s)

- Work with the End Users through AT&T connect to identify any possible role mapping or navigation issues that can assist in incident resolution.
- Allows users to utilize the chat tool or speak directly via phone with a “Screen Share” option with an OSSO Representative.
- User is in control of what they are sharing via “Screen Share” with On-Site Support.



## Description

FI\$Cal User Support Labs allow users to bring in questions regarding business processes, role mapping, incident issues, and submodule support to be worked on at FI\$Cal. Users may request Support Labs to resolve incidents at FI\$Cal through a request to the FSC, by completing and submitting a request form on the FI\$Cal website (available after the PSP period), or through the Change Management Office.

## Objective(s)

- Departments can schedule lab times in order to bring issues to be worked through with SME support at FI\$Cal.
- Allows departments to work directly with OSSO Sections to resolve incidents, or receive transactional assistance for real work examples.
- User Support Labs can be used to help departments with incident resolution and additional training.



## **Request:**

USL form will be available on the FI\$Cal website, or can be sent to the user by the FSC or Change Management office to complete. User will include a description of their issue, identify the availability of the department, and list any prior training received or previous incident reported.

## **Lab Setup:**

Labs will be set up for users based on submission of the USL request form, and will be available Tuesdays for AP and PO, Wednesdays for AR/CM and PC, and Thursdays for GL/LD. The On-Site Support Office will schedule sessions with users based on resource availability and room size (up to 20 users per session).

Additional times can be made available for specific need when appropriate.



## Description

On-Site Support Team is dispatched to the department. Requests that cannot be resolved through Incident, AT&T Connect, or USL's can be resolved through deployment of the OSSO to the users department. Deployment options will be available on Mondays and Fridays. Requests for On-Site Support will be submitted through the FSC as an incident requesting deployment, and will be routed to the On-Site Support Office Que for fulfillment.

## Objective(s)

- Work directly with departments to provide support at the departments location.
- Provide presentations of FI\$Cal functionality to multiple users for day to day transactional processes.





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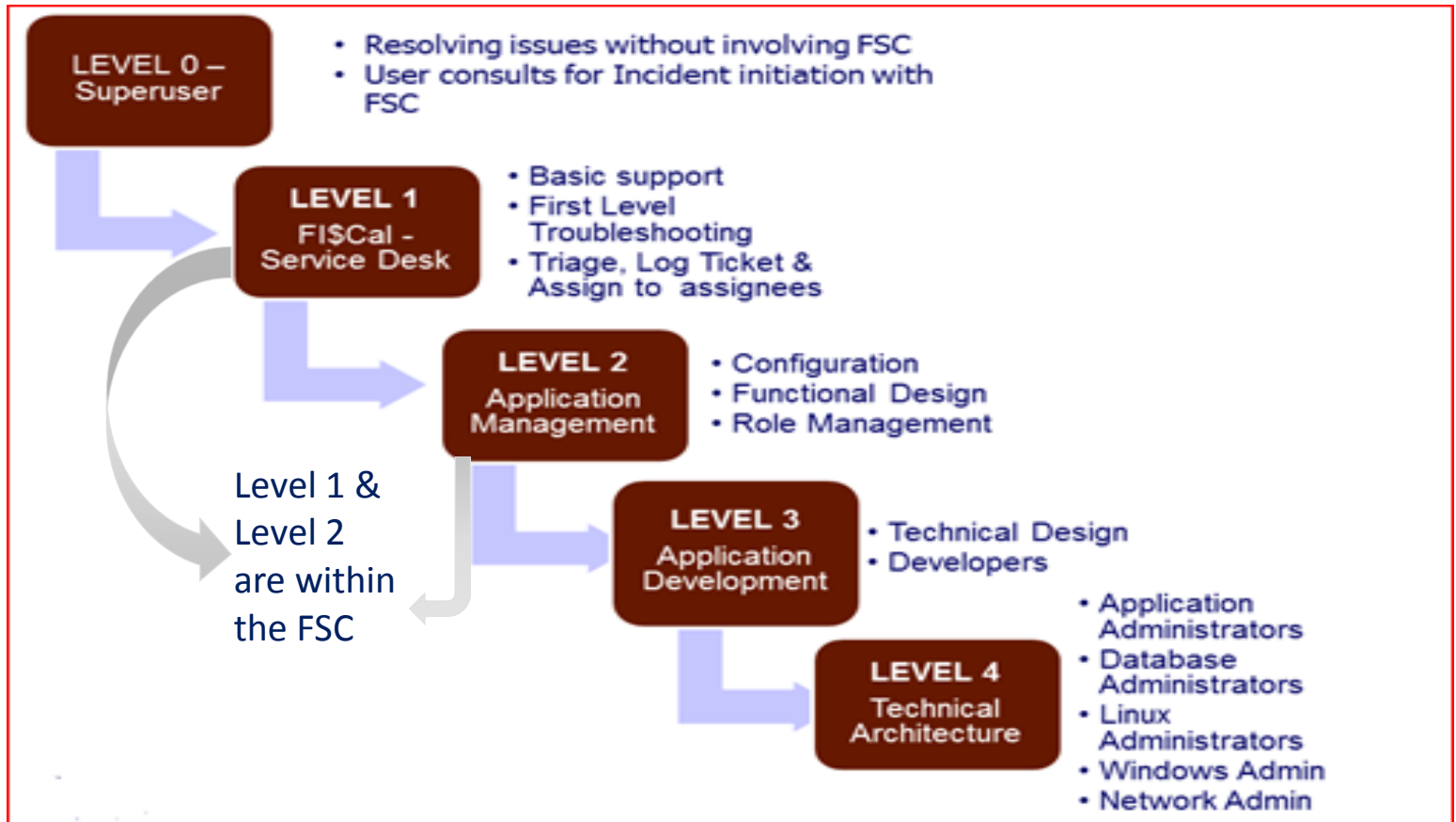
# Maureen Rielley

FI\$Cal Service Center

July 2017

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## FI\$Cal – Structure and Services



## FI\$Cal Service Center (FSC)

- Mission

To serve the best interest of the State and its citizens by providing excellent support and services to the FI\$Cal customers.

## Customer Service & Analytics Section (FSC Level 1)

### What we do...

- Your main point of contact for new issues and tickets
  - We will resolve the incident immediately if possible.
  - If we cannot, we perform the initial evaluation, triage and prioritization of incidents then route to the proper team(s)
- FSC Analytics and Reports
  - Daily, weekly, and monthly statistics, reports, and presentation decks
  - Analyze trends and triage critical issues

### Contact Information

**Email:** [fiscalservicecenter@fiscal.ca.gov](mailto:fiscalservicecenter@fiscal.ca.gov)

**Voice:** (855) FISCAL0 (347-2250)

**Web:** <http://www.fiscal.ca.gov/access-fiscal/>



## FSC – Things to do, speed up resolution

- Advise user to clear cache and retry process (as part of incident triage)
- Contact your department Super User to attempt resolution
- Providing the following information speeds up incident processing:
  - Steps leading to the issue
  - FI\$Cal User ID (some Users have multiple ID's)
  - Relevant Screenshots – include URL; Menu Breadcrumbs; Date/Time
  - Affected User's Contact Information – recommend affected user be the customer contact on incident, not Super User
  - If Budget issue – identify whether in Hyperion or PeopleSoft
  - Provide BU & clear description of issue/request in email Subject Line
  - BU + MEC/YEC in email Subject Line for MEC/YEC requests
  - Possible Workarounds
  - Providing this information at incident creation reduces the time for L2 to request additional information for clarification and analysis

# FSC – Data Privacy

## Be Careful Sharing Data

- Do not share your login credentials with anyone
- Do not email sensitive or confidential data to FSC
- Consider what you are sending – ensure confidential data is not contained in a screenshot or image
- If your problem involves sensitive data, please call the FSC for assistance in redacting the data prior to submission
- Consider requesting a WebEx session which may speed up issue resolution

## Business & Functional Services Section (FSC Level 2)

### What we do...

Your team of analysts providing functional support

- We perform research of reported incident
- We work with internal FI\$Cal service teams to determine if the system is functioning as designed, or to perform a fix to the system
- If we determine that the request is not business function related, we triage with appropriate internal FI\$Cal service teams to resolve the incident
- Keep open communication as we address your ticket
- Business Services
  - Assist with business services such as releasing vouchers within a stuck status
  - Assist with processes related to closing
  - Collaborate with internal FI\$Cal service teams to address MEC/YEC related tickets





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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:

[fiscal.cmo@fiscal.ca.gov](mailto:fiscal.cmo@fiscal.ca.gov)

