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# User Community Forum

July 2017





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# Will Padilla

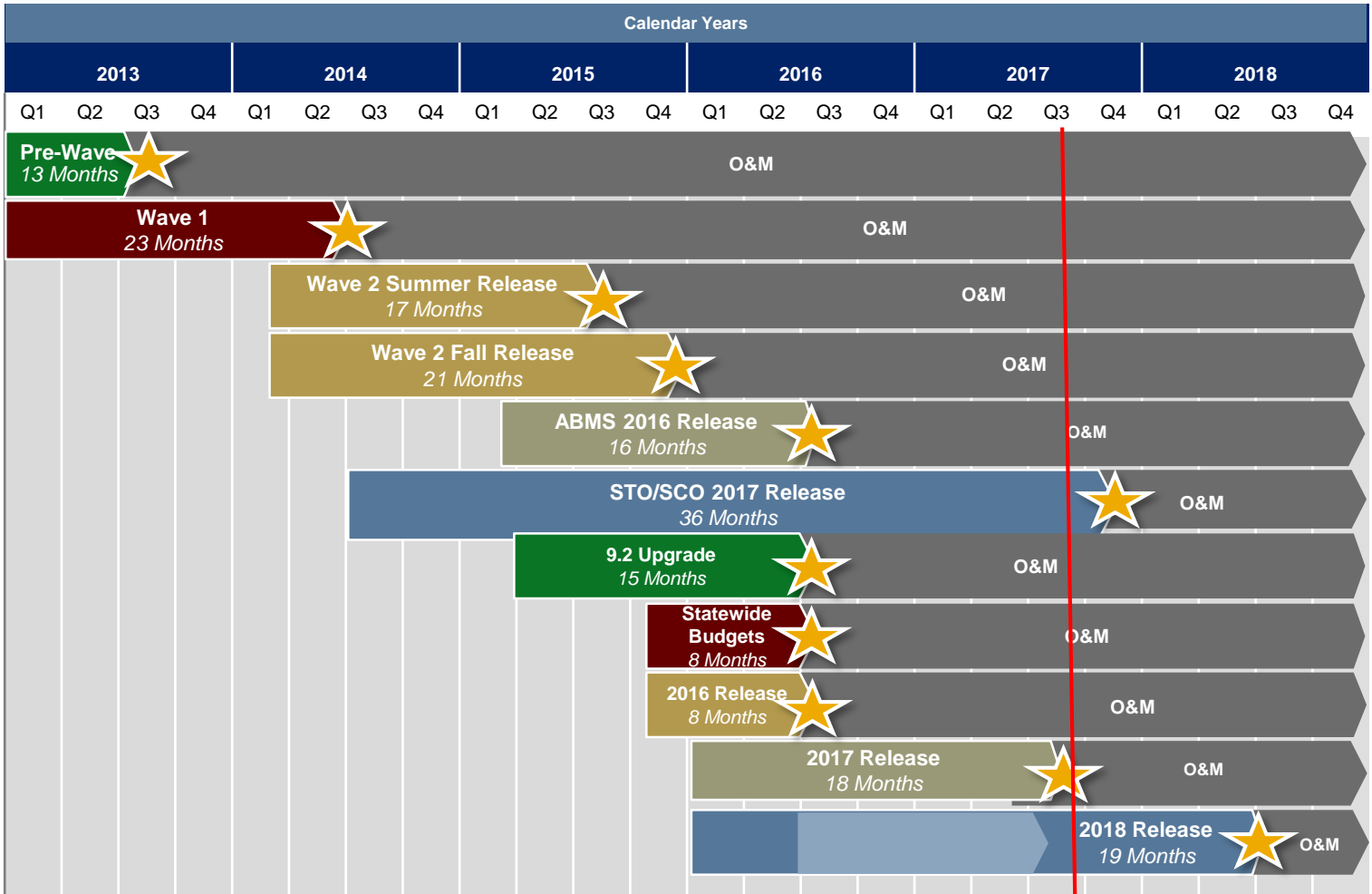
FI\$Cal Change Management Office

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

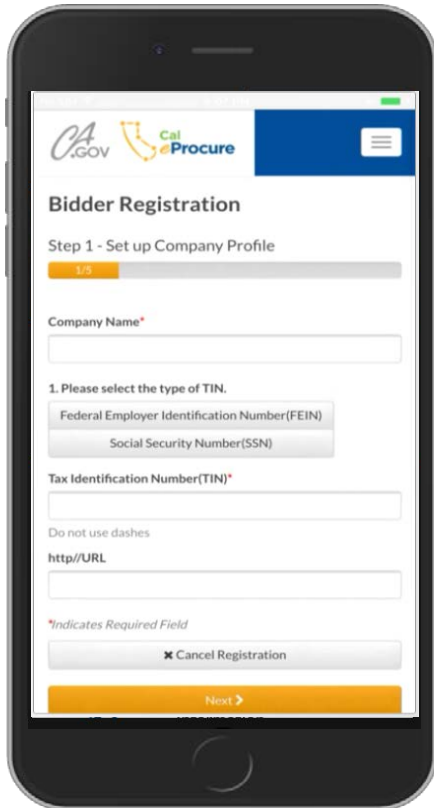
- Simplified Bidder/Supplier Registration
- Improved Notification Selection Process
- Enhanced California States Contracts Register (CSCR)

# Simplified Registration

- Reduce the number of questions
- Condense the number of steps
- Simplifying selection of notifications
  - UNSPSC selection
  - Ability to identify multiple email recipients
  - Ability to identify service areas



# Simplified Bidder Registration



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

Reduced the number of steps from seven to five

Removed non-required fields such as NAICS codes

Updated the text to improve wording

Simplified Notification information

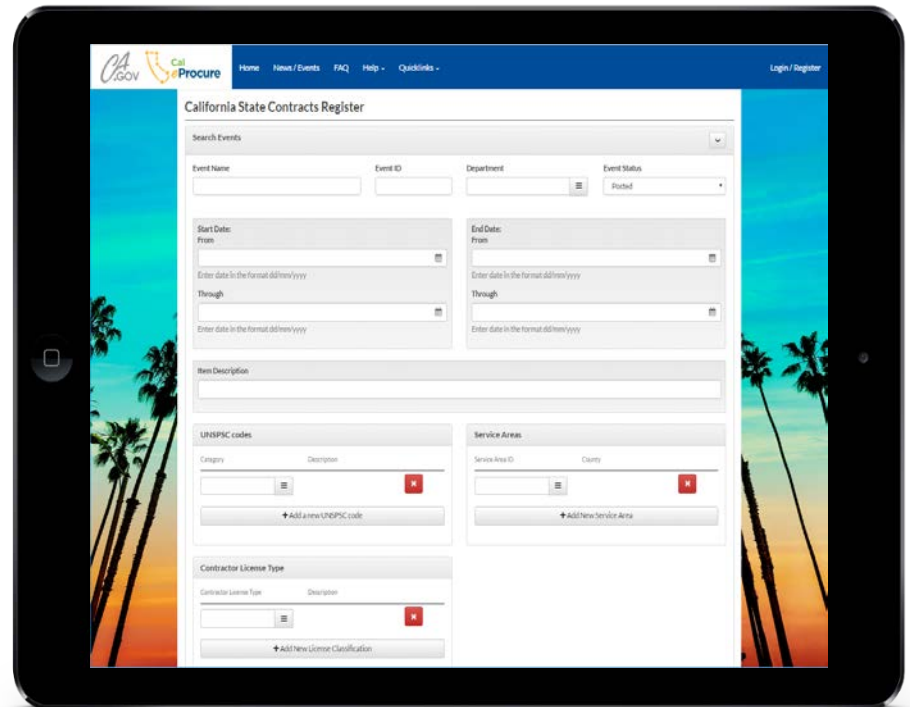
# Enhanced California State Contracts Register (CSCR)

- Bid events can be shared by email or by URL
- Additional details are displayed for bid events
- Searching for bid events has been simplified
- Advanced search for bid events has more parameters

# More Filters for CSCR Advanced Search

Added the ability to  
Search by:

- Service Areas
- Contractor License Type

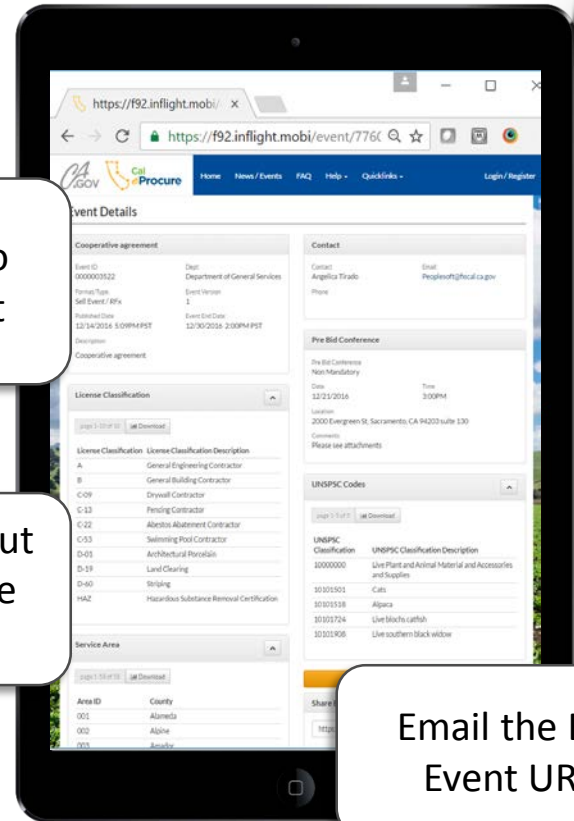


# Bid Event Details

Copy the URL to  
Share the Event

More details about  
the Bid Event are  
now available

Email the Bid  
Event URL



## Procurement related enhancements

- Changes to SCPRS entry page
- Changes to SCPRS public search
- Finalizing the STD 810 Contract Activity Report
- Enhancements to how OSDS communicates with SB/DVBEs



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# Raymond Esquer

Business Operations and Solutions Division

July 2017

14



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## On-Site Support Office Levels of Support

July 12, 2017



## On-Site Support Office (OSSO):

- Created to provide in-depth knowledge of FI\$Cal System functionality and departmental support for FI\$Cal users.
  - Departmental Support for FI\$Cal users
    - ❖ Transactional training and support
    - ❖ Business process training and support
    - ❖ Support to departments that are having reoccurring problems in using FI\$Cal
    - ❖ On-going consulting and education in the areas of:
      1. Role mapping and Workflow
      2. Transactional processes
      3. Configuration
  - Assist with the training and resolution of Month End / Year End Close incidents



## 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 the resolutions of Service Now tickets for role mapping, approval workflow, and system issues.
- Staff in the Procurement section will be trained in the FI\$Cal Requisition to Check sub-modules and will become experienced procurement / contracting professionals.

## On-Site Support – Accounting Section

- The On-Site Support Accounting Section will provide support to departments in resolving system errors related to processing of accounting transactions in FI\$Cal Modules. 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 MEC/YEC status.
- The Section facilitates resolution of issues 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 month/year end close (MEC/YEC) and General Ledger transactional support to departments for the FI\$Cal System. Support will include assisting departments with 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 in the FI\$Cal System 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 Levels



**Level 1**

FSC Incident- Incident Resolution

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**Level 2**

AT&T Connect –Online Meeting Tool

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**Level 3**

User Support Lab

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**Level 4**

Deployment Support

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## Description

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

## Objective(s)

- Tickets are resolved by On-Site Support Team 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

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)

- 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.
- End Users can work with OSSO staff to utilize AT&T connect during the ticket life cycle.
- 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)

- Levels 1 & 2 does not meet the users need.
- Too complex for options 1 & 2.
- Departments can schedule lab times in order to bring issues to be worked through with SME support at FI\$Cal.
- 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)

- Levels 1-3 does not meet the users need.
- Detailed training or business process analysis that requires support at the departments location.



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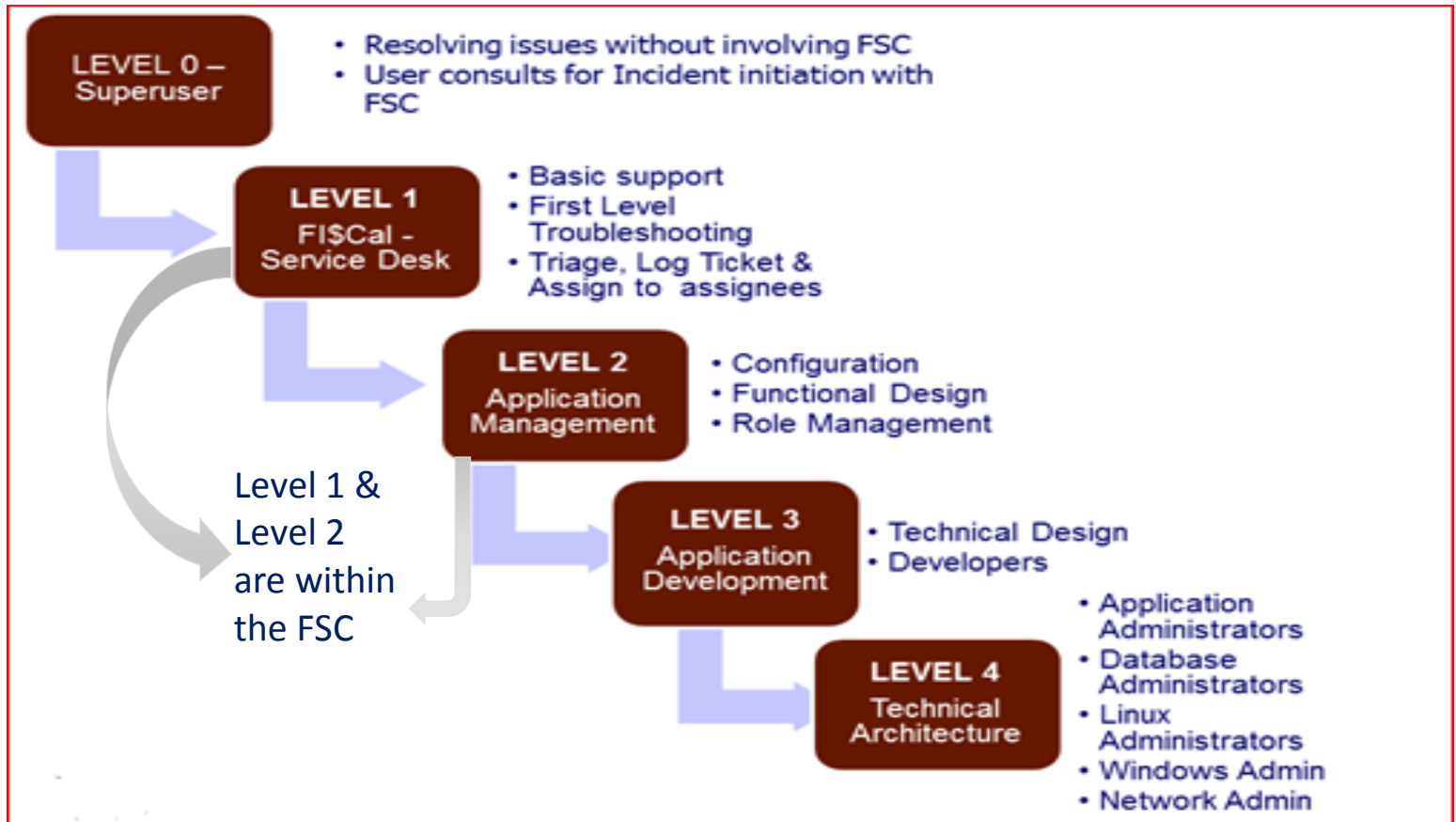
# Maureen Rielley

FI\$Cal Service Center

July 2017

26

## 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)

