FI$CAL USER COMMUNITY FORUM

DATE: WEDNESDAY, MARCH 23, 2016
TIME: 9:30AM – 11:00AM
LOCATION: DEPARTMENT OF HEALTH CARE SERVICES EAST END COMPLEX, 1500 CAPITOL AVENUE, SACRAMENTO, CA 95814
ROOM: AUDITORIUM

Facilitators:	Neeraj Chauhan Mary Snovel Wes Riley
Meeting Purpose: **Type of Meeting:**	FI$Cal User Community Forum

AGENDA TOPICS/MINUTES

#	**Topic** *[Brief description]*	**Presenter** *[Name]*	**Duration** *[Time in Min.]*
1	Introduction/Agenda/Timeline	Neeraj Chauhan	7 Min
2	Tips & Tricks: Cal eProcure & FI$Cal Procurement/Demonstration	Mary Snovel	50 Min
3	FSC Incidents/Questions	Wes Riley/Mary Snovel	27 Min

QUESTIONS AND ANSWERS

QUESTIONS	ANSWERS
Q1: When posting an event can you save it and finish it at a later time?	A1: Yes, when you create it you assign it an ID.
Q2: UPKs – How will FI$Cal ensure departments will be notified when UPKs are updated?	A2: **(Mary)** - We are constantly updating materials so you can do your job in FI$Cal and making sure materials are current. It will come through CMO when it is ready and we will communicate to you – probably through your DL. **(Kelly)** - We will send an email to DL whenever there is a major update to the UPKs or Job Aids. **(Mary)** – Make sure you know who your DL is so you can get info and do your job – so you know when material is updated.

QUESTIONS AND ANSWERS

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Q3: We had some feedback from our field offices that Line Items aren't popping up so they can't find Item ID numbers so they are leaving those blank. They can find Categories so they are assigning those. Is that ok or is a Line Item required?	A3: Are you talking about in SCPRS? (ANS: YES) I believe they are referring to the UNSPSC - the Category is on the line so it will populate the area. Must put in certain data in the line. In our User Support Lab last week we had a user that was trying to select and Item ID in the Line, and Item IDs are only associated with LPAs. So if you haven't used an LPA for that transaction you would not select and Item ID. You'd move on to Description – put in what the description is and then move on to the category UNSPSC and do the search – like I showed you today – put in "contains" and then look through the UNSPSC codes, select the one that most applies, and it should populate information for you in that line. If there are any other issues you can email us and we can take a look at it for you.
Q4: The other question I have is regarding BU's. We transact on behalf of three other BU's – and we reached out to FI$Cal and they said that we have a two groups of people with different profiles. The problem we're having is our headquarters people who do transact for those BU's and our field offices aren't allowed to select the people out in the field offices because they are assigned to other BU's. That's a huge problem for us.	A4: We need to talk off line to get more details. Are you with the Department of Education? (ANS: PARKS) Your users have the capability to be mapped to those other BU's. So we're going to have to look at that.
Q5: We were looking for Small Business – We found that some are on Bidsync but we found that some are not turning up on the new Small Business search.	A5: Contact the Office of Small Businesses and Disabled Services at DGS to see what the issue is. Maybe they can provide some information – maybe there is something going on with that particular small business - if they are an active business they should be in FI$Cal. If they are active you should be able to use them as part of your transaction.
Q6: Is there a way for vendor to enter his 204 information into either FI$Cal or the DGS site? One of the complaints I get is "I fill one out for you, I fill one out for them." Is there a place where a vendor can put his 204 information in? That would probably be good.	A6: It's maintained within FI$Cal as part of their vendor file but only certain people have access to that information. So they submit the copies of the 204 which are maintained by the departments. FI$Cal does not maintain 204's the departments still do. So currently there is not. The vendors don't put that information in. Our Vendor Management Group puts that information into FI$Cal as part of their Vendor file for payment purposes and everything else, but the vendors are not putting in that information into FI$Cal.

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Q7: Will Q&A functionality be added later on the portal like there is in Bydsync?	A7: DGS is working with the Project. We are working on additional CSCR event/solicitation functionality. However, it's not finalized. It's not something that's going to happen over the next few months. But we are working with them. So yes, the hope is we have the Q&A functionality available to the FI$Cal users as soon as possible. But in the meantime, we do have this work around that we've noted in the handout that's in the CSCR Tips & Tricks for departments to do that. The detailed information is in your handouts.
Q8: Is there an eta when SCPRS upload option will be available?	A8: It is available now for some departments right now. The Project did make a decision to delay any more onboarding of the upload processing until after our 9.2 upgrade, because it does have impacts and what that means is you would have to change some of the information in your uploads. To avoid that, we've decided not to onboard until after the 9.2 release which right now is scheduled for July.
Q9: I have a question on SCPRS. We're a department that's only doing that right now. It is very difficult to say the least. Is there a functionality so you know what's required to put in and when you make an error it doesn't highlight what the error is, so you re-enter everything again and it can take up to an hour to do one entry.	A9: Usually when you don't have information in a field that is required, it makes it red so you are able to see what you missed and the data you need to put in to complete the transaction. Another indication of required fields is asterisks – that generally means it's required. I can't say that's always the case. There are some that don't have asterisks and the information is required. We can look into getting job aids. You can come into one of our USLs, we'd be happy to help you with that and give you some tips on required data and help you understand the errors you've been getting. If you are having issues, please let us know so we can take your information and improve the process.
Q10: On Small Business/DVBs – my experience is that the Small Business certification was attached to the legal name. So we were searching for DBAs, that certification wasn't popping up unless you search for legal name. Has that been fixed or is that one of the issues that people are having when searching for small businesses?	A10: I believe that is still correct. It is attached to the legal not the dba. I don't think that's going to change anytime in the near future. You can contact us, DGS, OSDS and make your recommendations if you are having any issues with that. It was definitely something that was looked at by the Project and DGS and that was the best way to solution that. The General Vendor search will pull up if you search by Small Businesses or All Vendors. We want it to be easy for you and we welcome your opinions so we can look to make improvements needed.

QUESTIONS AND ANSWERS

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Q11: Regarding eProcure - when I use the search for Small Business or DVBE and also LPA contracts, sometimes it kicks me out to the log in screen that the vendors are supposed to get – or even when I'm searching for a contract, it will kick me out thinking I'm a vendor to log in. Who should I contact to see what is wrong?	A11: It should not do that. Those searches are only available to the public. Not sure why it would do that. If you are having that issue talk to others at your department to see if they are having that issue. Contact FSC and create a ticket with as much information as possible, if you have screen shots please send that. If it's affecting multiple departments we need to know so we can fix it.
Q12: I'm having issues opening attachments for contracts. When you click to open it, nothing comes up.	A12: Contact FSC and open a ticket. It's something we can look at to see if it's a technical problem on your end.
Q13: We've been told it's a browser issue and if you refresh your browser every time it will fix it. But you shouldn't have to refresh your browser ever time so hopefully FI$Cal is still working on it.	A13: You need to make sure you have browsers we showed you earlier. You will not be able to use Cal eProcure if you don't have proper software. You might be able to get in but you will have issues if you try to drill down further. We can talk to you offline to see what browser and version you are using and we can look into that.
Q14: I was looking at the numbers of responses you're getting on surveys as well as tickets. Both FI$Cal and the tickets and the responses are ascetically difficult to view and get to. I've put in tickets. By the time I read that entire email – it would be much easier if it populated how did it go – click here – I know a lot of buyers hate it. It's like no one asked us, the end users, does this work for you? You're asking DADS or Liaisons. What about us who use it every day?	A14: It's fair to say the survey should be shorter. When you get the invitation it takes you to a survey online… **(Kelly)** We'll take a look at it. The whole room nodded and said "yes" **(Wes)** If the survey is too long, if there's nothing else you answer, you can skip to the bottom and that one question is the most important to us – just overall, how did it go for you, did we solve your problem? And there's an area for comments – I read each and every one of them and the comments are very helpful to us.
Q15: You need to invite end users to these forums…	A15: Your DL should be informing you of information. Make sure you know who they are. Ask them to add you to the email distribution list. If you are registered today you will be added. We want your participation.
Q16: Is it possible for more info to be shared with end users? Because it's the Buyers that get most of the problems and they only hear the high end.	A16: Absolutely. That's something we work on with our Communication Office. We also work with our Partner Business Agencies, such as DGS, SCO, and DOF and State Treasurer to make sure they are also communicating with their customers. We want you to know the process – who at your department we do communicate with so you can reach out to them as well and make sure they know how important it is for them to get information to you so you can do your job.

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Q17: Regarding Events – it says in the handout that FI$Cal doesn't track people who view your event only those who accepted. Let's say you don't invite anybody but then they view it and want to put in "hey, I can be your sub for this part of it" does it track that?	A17: It is limited in what it can do. Working with DGS on because we know you're required to track that information for certain things. Whether or not you've invited them, we're looking at that. So I'll talk to you about it or get back to you on that. It's definitely limited functionality and what we provided for you today in your screen shots is what we have available.
Q18: I have to invite them in order for them to accept, correct?	A18: Correct, it's only for those who accept.
Q19: We started to post our first bid about a week ago and didn't save it so we lost everything. Is there a way to save bid and post later?	A19: Yes. Save and save often. It does time out at 30 minutes. So save as you go and save often. There are some things you can't save such as on a SCPRS transaction. You want to make sure you have enough time to get it completed. For Events, you can definitely save. You'll have to note your event ID so that you can come back and look at that. If you've posted it to CSCR and you want to make a change, that's a little different because then you would have to do a new version.
Q20: Back to if you can tell if they have viewed it or not – when you guys are looking at this correction, I saw in your notes we can tell after the event is closed, but we need to know before it closes because sometimes there can be a problem with email - we want to know who has viewed it along the way. So when you go to correct this can it be before the event closes? And also about SCPRS, when we enter it in will we get confirmation, something we can print out for our files?	A20: There is not a notification. You can do a screen save or do a query in SCPRS to see if their transactions were in there. Then you would print.
Q21: Inaudible Question/Dialogue	A21:
Q22: Are you saying the FI$Cal SCM supersedes the others?	A22: For FI$Cal users, yes.
Q23: Everyone heard that right?	A23: So, if you're a FI$Cal user, for those who are doing SCPRS and CSCR only, then you would look in there for that information for just SCPRS and CSCR but you still have to go to the regular SCM for your other information. For departments that are using FI$Cal for their procurement functionality, then you would look in the SCMF and then if there is any other information you need you would also go to the regular SCM's two and three, one maybe as well for the information you would need to perform your tasks.

ANSWERED AFTER THE MEETING

QUESTIONS	ANSWERS
Q1. What if a vendor is not in FI$Cal? Can we enter it or do we need to let FI$Cal know? Asked by Rajhir Kaur	If a vendor is not in FI$Cal, the department user with the “Department Vendor Processor” role can add the vendor in FI$Cal. When they add the vendor, the status is unapproved, and when they save the record, the save button triggers the workflow which queue’s the Vendor Management Group (VMG) to review the added vendor and set the record to approved so that it is available for departments to use. If there are issues with the vendor record being added (duplicate of a vendor already in the system, missing information such as a STD 204), then the VMG staff contacts the department user to explain the concerns and works with them to resolve the issues and takes appropriate action with the vendor record.
Q2. Do we have to respond to all the bidders/vendors, or can we choose the top 3? Asked by Rajhir Kaur	This appears to be a DGS policy question and should be emailed by the customer to PAMS@dgs.ca.gov. for DGS response.
Q3. When creating a solicitation and posting a Non-IT or IT serviced event what is required to put in the line item section? The reason I am asking is because for services you won’t have line items. What do you put there? Our work around was to put the name of the solicitation (i.e., IFB #246). Asked by Wendy Bright	The buyer should enter the UNSPSC code to generate an Event notification to the bidders who registered for the UNSPSC code, and as much other information as possible, such as description, etc.

Q4.Can you only see who viewed after the event is closed? We need to know before. Can you invite a certain UNSPSC or category that has a CMAS? Asked by Wendy Bright	Since this FI$Cal Forum, an improvement to viewing bid history has been made in FI$Cal: 1. Navigate to Main Menu > Sourcing > Maintain Events > Event History 2. Enter the Event ID and click the Search Button 3. The Event History Page / Event Information page is displayed 4. Click on View Bid History icon 5. A list of View/Download History is displayed that is available to download by clicking the download icon Currently, a buyer would use the LPA/Department Contract Search tool to search for CMAS and associated UNSPSCs to invite to their Event. It is recommended to do this search prior to creating the Event, but it is not required. 1. Navigate to: Main Menu > Procurement Contracts > LPA/Department Contract Search. 2. Select the contract type as CMAS and enter the category (UNSPSCs) for the goods/services and check “Show LPAs” 3. If the buyer doesn’t know the category (UNSPSC), it is best to search in category by Description, click the drop down arrow to “Contains” and then enter a key work like “scanner.” Then select the appropriate UNSPSC for the goods and/or services. 4. All contracts matching your contract type and UNSPSC code will be displayed in the search results. Click on the “Additional Information” tab. 5. Each matching contract’s Vendor ID and Vendor Name (and other contract information) will be displayed. To download the information into Excel, click on the download icon . 6. Follow the prompts. Open or Save. The Excel document will be displayed. A buyer would then take this information and enter it into the Event they are creating (UNSPSC should be entered in category field of the line) and bidders who registered in Cal eProcure for this UNSPSC will receive an Event notification, including any CMAS vendor registered in Cal eProcure who chose to receive notification based on the UNSPSC. The buyer can also choose to individually invite the specific CMAS vendor(s) to the Event.

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Q5. What happens after you enter into SCPRs? Will it tell you that it's confirmed, or in there? Do you get anything for your files to confirm you entered it into SCPRS? Asked by Wendy Bright	FI$Cal SCPRS does not generate a registration number. Therefore, state agencies are no longer required to enter a SCPRS registration number on purchase documents. SCPRS entries are automatically generated in FI$Cal once saved. Departments may do a SCPRS search to confirm.
Q6. Can you invite bidders who were in Bidsync to view the solicitations before they register in Cal eProcure? Asked by Wendy Bright	Bidders have to be registered in Cal eProcure to be selected/invited to an Event. The business process is to have the buyers send/email the Event/Solicitation to the bidders (outside of FI$Cal) and ask them to register as a Bidder in Cal eProcure. However, if the Event is checked as a "Public Event" in CSCR, anyone can view the Event/Solicitation without logging into FI$Cal.
Q7. In FI$Cal should our DGS CAN#'s post directly to the funds or clearing account? Asked by Lori Moore	It would be based on the fund associated with the CAN and if they are set up on direct transfer.
For the next Forum, could you dedicate time to explain how all modules interact with one another. Explain the chart that shows lines to/from each module. What data flows between the modules? What are the effects of those data changes? Asked by Alice Jueng	We will consider this for a future tip and trick topic; however, this is information that we have covered during our solution walkthroughs and business process workshops, many of which were recorded with Adobe Connect. Those materials are posted on the 2016 Release and 2017/2018 Release resources pages.