FI$CAL USER COMMUNITY FORUM

DATE: WEDNESDAY, MAY 18, 2016
TIME: 1:00PM – 2:30PM
LOCATION: DEPARTMENT OF HEALTH CARE SERVICES EAST END COMPLEX, 1500 CAPITOL AVENUE, SACRAMENTO, CA 95814
ROOM: AUDITORIUM

Facilitators:	Michael Muth Eric Harrald 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	Michael Muth	18 Min
2	FI$Cal Information Security/Tips & Tricks	Eric Harrald	52 Min
3	What We've Heard From You	Wes Riley	12 Min
4	Close/Final Information	Michael Muth	2 Min

QUESTIONS AND ANSWERS

Q1: Will 2018 Release departments continue to do tasks after the Global Analyze phase is over when the focus is primarily on 2017 Release Departments?	A1: The 2017 Release departments will be engaged in a number of tasks that that they need to complete so that they are ready for release in July of 2017. From now through that time, there are a number of activities and tasks that the 2018 departments also need to focus on, such as As Is/To Be business processes. More information will follow on that.
Q2: Will 2018 departments receive an updated Master Department Work plan?	A2: Yes they will. The Master Department Work (MDW) plan for the 2017/2018 departments has focused on Global Analyze, but there will be separate MDWs for 2017 vs 2018 departments following Global Analyze.
Q3: Are you going to be doing User Support Labs outside of Sacramento?	A3: Yes, we will be traveling to Southern California for USLs.
Q4: In regards to the User Support Labs, we're a 2018 very large department and we're looking at our current business processes to see how they fit in. Would there be a way to observe what some of the other departments in production are doing?	A4: I know there's been conversation on that especially from departments that are currently live in the system for those that are in the midst of onboarding activities. I don't know the specifics, but I have heard that there are a number of 2016 Super Users engaging departments that are live in the system in terms of their specific planned activities.
Q5: How many people can you support in your User Support Labs?	A5: It is typically a smaller group, such as 12 to 15 individuals at a time. It is better to have a smaller group so that the team can focus and work their specific issues.

QUESTIONS AND ANSWERS

Q6: In the Approver workflow there are people – specifically DGS – that are not our employees. Why is that?	A6: There are some control agencies that have statewide access or statewide view into all procurements or all approvals and there are also other control agency functions that have the ability to approve at any level a particular purchase. When we have these statewide roles, and they go into an approver position, their email/name gets into the approver workflow processes and you see that they are receiving those emails.
Q7: In other words, if we are revising our contract workflow, we can't remove them? Even though they don't add any value to the process?	A7: No, you cannot remove them.
Q8: If there is a department that is doing procurement on behalf of another department, who submits the form from a security perspective?	A8: Each department is responsible for approving access to their data within the FI$Cal system. If another department needs to transact on behalf of your department, then they have to contact you and have your DAD fill out and submit the access request form to the FSC.
Q9: What happens when you have a small department that doesn't have enough staff to cover all the Separation of Duties?	A9: We do see that with some of the smaller departments and some of the boards where they only have one state employee. These situations are few and far between. There is a process if you are a very small department and we will work with you to make sure you get the appropriate access you need. Please keep in mind though that a DAD cannot approve access for themselves. We recommend that there be at least two DADs in those smaller departments so that they can approve access for each other.
Q10: How deep is the Separation of Duty on average?	A10: If you want to have an approval layer that is 15 people deep, we can accommodate that. That is up to your department.
Q11: If someone has pre-existing access and we add additional roles, is that field reading only from this sheet only but nowhere else?	A11: No it would not catch that. However, we would catch that in the review process of the UARF.
Q12: Can you give an example of when the UARF and MARF would be used?	A12: If you have one user that needs access you would fill out the UARF. If you have five or more users then you would use a MARF. The exception to that is when we do a release and bring departments on, we allow 30-60 days for you to use the MARF no matter how many users are on it.
Q13: I'm a DAD in my department for one specific module. If I need access changed, does it have to be a DAD that is responsible for that module or can another DAD from the department submit it?	A13: Any other DAD in your department can submit that for you. From my perspective, you have a department with an Authority and five Designees, anyone of those five can submit a request. It sounds like your department has established an internal business process in which you've assigned DADs by module.

QUESTIONS AND ANSWERS

Q14: Difference between UARF/MARF - why does one require a wet signature?	A14: The MARF does not require a wet signature. That's not an easy question to answer. We have a requirement from SAMS that everyone needs to affirm or agree to abide by acceptable use of the system. That was the thought behind the wet signature on the UARF. The user has to affirm that yes, I know I am getting this access. I know that if I do anything outside of that, I could get in trouble.
Q15: If you have access to multiple BUs, can you have different roles for those different BUs?	A15: You would have to have multiple accounts. BU access is a main security identifier for what segregates data in the system. So your roles allow you to do things upon the data that the BU gives you access to. If you want to have the AP Processor for one, and AP Viewer for another, you would have to have two accounts.
Q16: Do you have a Separation of Duties chart?	A16: There is a chart within the MARF spreadsheet on one of the tabs. It is accessible online.
Q17: If we have an immediate separation of a user, who signs the form, the DAD or the supervisor?	A17: Send the FI$Cal Service Center an email or call, we will make sure that user is removed immediately. That's called an Emergency Revoke.
Q18: Is there a way for the departments in the future to view a report of their users?	A18: Yes. There are some reports in the works that will provide departments with end user reports on a frequent basis. Then we will be able to send out a task to DADs on a quarterly basis so they can review their user access and affirm if they are still accurate.
Q19: Different BUs require multiple accounts and multiple email addresses. Does that apply to sub-BUs?	A19: Sub-BUs work a little differently, but I believe the same would apply.