2017 Release Training Liaison Web Meetings

Monday, July 10, 2017

This was the final TL Web Meeting for the 2017 Release. Training measurements for this release are closed and departments are now live.

The only question asked at this meeting was specific to one department and handled by phone after the meeting.

On behalf of the management and trainers at FI$Cal, I would like to personally thank everyone for their participation during this training season and for your attendance at the weekly web meetings.

On each call there was active engagement, enthusiasm for the process, and thought provoking questions that were relevant and helpful to all participants.

Just because the scheduled meetings have ended and your departments are now “Live” doesn’t mean that you no longer have a platform for assistance. The contacts shown in each meeting notice are still available to you as well as the FSC and the CMO Mailbox.

Good luck!

2017 Release Training Liaison Web Meetings

<u>Monday, July 03, 2017</u>

The meeting for this date was canceled due to the 4th of July Holiday and anticipated low attendance.

2017 Release Training Liaison Web Meetings

Monday, June 26, 2017

Q-1: I have been told that the USL module lessons do not count toward completing the module even though the USL and web learning are the same. Is this true? The USL does not count for completing the module?

Clarification of above by the TL: I meant the …"instructor led, not USL"

A-1: If the question is actually, "Do the instructor led (ILT) courses count toward completing your modules, the answer is yes. Whether you take the courses as a web based (WBT), or ILT, they will count toward completing your numbers.

Q-2: Is the USL for requestors and approvers as well?

A-2: USLs are for any current FI$Cal end user that needs assistance.

Q-3: Is there a meeting next Monday on the 3rd?

A-3: We have decided not have a meeting on Monday, July 3rd because of anticipated low attendance due to the 4th of July weekend. A reminder will be sent out Friday advising everyone that Monday's meeting has been canceled and that the next meeting will be on Monday, July 10.

2017 Release Training Liaison Web Meetings

Monday, June 19, 2017

Q-1: Will STO be holding another training ILT for CM231 – Report 14?

A-1: Report 14 training at STO is scheduled for Tuesday June 27, 2017. Interested departments should contact Kendra Brickner, Kendra.Brickner@treasurer.ca.gov, if they would like to attend.

2017 Release Training Liaison Web Meetings

Monday, June 12, 2017

Q-1: What happened if we do not meet our 80% metric?

A-1: There would have to be decisions from upper management as to that department's ability to participate in that go-live cycle. There is no definitive answer as there could be many factors that might affect this.

Q-2: What are the dates for the USLs?

A-2: That is planned from July 25 through September 28.

Q-3a: How do we register for USLs?

A-3a: TRNG-710, the USL Request Form, will be coming out soon. Just follow the directions in this task to register. However, in order to qualify to attend a USL session, that person (not the department) must have completed their required training.

Also, please be aware that, before attending a USL, you must also have been mapped to a Summary Role and have your FI$Cal-live "credentials". In other words, you must have an ID and Password for the live system, not just the training environment.

Q-3b: Can secondary users attend or is it only open for Core users?

A-3b: Anyone can attend as long as they meet the requirements as stated above.

Q-4: Although we can't modify role mapping until go live, can we add/delete training classes due to staff reassignment? We can't do it on the role mapping but can we do it on the weekly training form?

A-4: Yes, you would use either the New User form, or the Maintenance Request form found on the FI$Cal Website.

Q-5: At what point will the role mapping be opened for changes after go-live?

A-5: For questions concerning role mapping, please consult your Readiness Coordinator.

Q-6: Could we bring a group of end users to a USL? We were looking at doing something similar here. (Example: all our requestors will bring work and come to a session).

A-6: Due to the fact that we have limited space available, each department is asked to limit the number of people they send to any one USL session to 3 learners and ask that you also send 1 Super-User for a total of 4. Your department can, however, request more than one session so more can attend.

Q-7: What is the total number of departments reporting in the red?

A-7: Eleven departments are in the red as of 6/13/17.

2017 Release Training Liaison Web Meetings

Monday, June 5, 2017

Q-1: We had someone whose web based course (PO123) expired before completion. What do we do to get her training back?

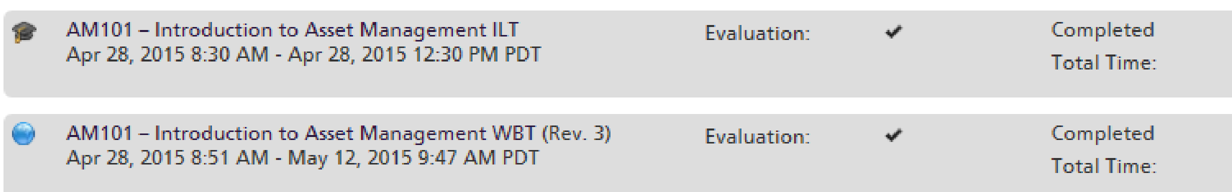
A-1: When training appears in your Learning Path, you have 60 days to complete this training. If you do not complete the training within that timeframe, you have to go back to the catalog and re-enroll for that class.

Q-2: Is it possible for the Dept. Liaison and the Training Liaison to get access to all the courses so we can develop desk procedures using our processes?

A-2: Yes, you already have access to all of the courses by accessing the Catalog within the University of FI$Cal.

Q-3: Do you have to take an ILT to get the survey? Not sure what the ILT survey is.

A-3: If you take a course as WBT (even if it is marked as an ILT course), you only have to do one survey (the one associated with the “globe” icon). You only have to do the additional survey associated with the “graduation cap” icon if you take the course as an ILT. One way to access the surveys is by going into your Training Records/Current Learning Modules as shown below. If a survey has not been started, there will be an exclamation point “!” in place of the check marks shown in the example below.



Q-4: In Parks, some super users say that they have lost their learning paths. Do you know about this, and if so what is happening?

A-4: At a certain point before “go-live” the multiple courses assigned to the super users are removed and they are then given only the courses that align with their Summary Roles. However, all of the courses are still accessible thru the catalog.

Q-5: If a staff member is removed from the FTA (UF) on the Maintenance Form, will they still have access to take courses if they desire?

A-5: If, when you submit the form, you state to “remove” the learner from the UF, this usually indicates that you want the learners account closed. In that case, the account will be totally closed with no access to the UF. However, there is an option on the form to “update” learner and then in the Role column put “R” to remove this role from training. The learner would still have access to the University of FI$Cal but not have a learning path.

Q-6: We have a brand new employee who will not be added to FI$Cal until after go-live. Is it possible to have him added now for training purposes?

A-6: Yes, absolutely! Just submit the Maintenance Request Form for adding a new learner with their associated training roles. Forms received by the close of business on Mondays will be processed in time for the weekly report on Thursdays.

Q-7: What is the difference between a core user and a super user?

A-7: 1. A super user is someone that is given access and training on all the modules used by your department and can be looked to as the first line of support in your department.

2. A core user is a “first line” end user. One of the main users that needs to get up and running in their specific modules to perform their job on Day 1 of go live. The reporting matrix is based on core learners.

Q-8: Do the super users affect the percentages?

A-8: No, the report is based on core learners and their required courses. If a Super User is also a core learner than their courses do affect the percentages.

2017 Release Training Liaison Web Meetings

Monday, May 22, 2017

Q-1: Training changes were made on FI$Cal's end and we sent a lot of corrections last Thursday 5/18 to fix "them". When can we expect revisions to be made?

A-1: Those corrections will be made beginning the following Monday and will show up on the next Thursday report.

Q-2: We have some super users with training on their learning path which they should not have. Are you going through to verify some of the training or how should we handle this as it impacts our 80% metric.

A-2: Please use the "*2017 Release Training Maintenance Request Form*" found under "Related Links" on the University of FI$Cal main web page to enter the names of any learners who need changes or have courses in their learning paths they shouldn't have. As mentioned above, changes submitted to the CMO Mailbox by Monday will be reflected in the Thursday report.

2017 Release Training Liaison Web Meetings

Monday, May 15, 2017

Information:

(OSHPD) -We received this note in accordance with State Administrative Manual (SAM) Section 5360 (Identify and Access Management). FI$Cal will be monitoring and disabling user accounts that are inactive for more than 90 days. Role removal will occur after 180 days. To remain active, users must log into FI$Cal at least every 90 days. If changes need to be made to the user account or if a user needs to be re-enabled, please use identify Self Service to request changes. So, the questions (1a, 1b, and 1c) are from the Budget shop.

Q-1a: Based on the above information, does logging into FI$Cal University stand alone in this regard?

A-1a: Yes. The University of FI$Cal is apart from the FI$Cal System. Although there is no automatic inactivity deactivation in the University of FI$Cal, we may inactivate learners who are not part of the current Release (Release 2017) and have not logged in months. Their transcript information is archived and not deleted.

Q-1b: These users log into Hyperion daily but they haven't logged into train in quite a while. Are they separate?

A-1b: Yes.

Q-1c: If they get locked out or deleted, where do they go to be re-instated in the University of FI$Cal?

A-1c: For Release 2017 learners who get locked out from to many wrong password attempts, can email us at fiscal.cmo@fiscal.ca.gov to unlock and reset their password. If they need to be reinstated, the training liaison would need to submit the Maintenance Request Form to make them active again.

Q-2: (OSHPD) Based on the PO Approver Role, we have a discrepancy in all the "Approving Users" learning paths. According to the FI$Cal Change Discussion Guide that was provided to us from a FI$Cal Workshop, the Approvers should have a required course of PO214. According to the link you gave me to the role matrix, the PO Approver should have PO225 as a required course. (A) This is a conflict. (B) Our approvers do not have either of these as required or optional. "Can you explain?"

A-2**:** Requisition Approvers must complete PO214. This was corrected in the University of FI$Cal and in the Roles to Course Mapping Matrix. PO approvers already have PO225 as a required course in their job profiles.

2017 Release Training Liaison Web Meetings

Monday, May 8, 2017

Q-1: (a) My question is related to differences between the Weekly training report and the assigned group review page. I have two individuals that have an additional module listed on the weekly training report that shows up in the group review page. How do we fix this?

(b) These two individuals have not had any changes to their roles since the beginning.

A-1**:** The Weekly Training Report is basically reporting on the Core learners for Release 2017. The assigned group review is a listing of all learners in your department. They could have had an account as a super user etc. It is possible that they have different job profiles from before such as Statewide Budgeting or a Super User job profile. If they have a Release 2017 job profile that needs to be removed please fill out the Maintenance Request Form to remove these profiles (you can even use the comment section if you can't find the job profile).

Q-2: (a) I am finding that the summary in the University of FI$Cal does not always match the R-17 (weekly report). Is this still a work in progress?

A-2**:** The weekly training report only reports on Release 2017 job profiles. Please see question and answer above. The summary in the University of FI$Cal can show job profiles they had as super users or statewide budget users. If you provide specific examples through the CMO Mailbox (learners) we can explain specifically to the situation.

2017 Release Training Liaison Web Meetings

Monday, May 1, 2017

Q-1: We have had some reorganization in the Department and some roles have changed. One in particular started her job today and is now a core user. She has a tremendous amount of training added to her learning path. Since we must be completed by June 6th, I do have some concerns with her time to complete everything. Is there any “grace” period for any of these types of changes?

A-1**:** We do understand there will be certain situations where new users come on board and may need an abundance of training to be brought up to speed before June 30. This may require, for example, designating a quiet area and setting aside specific time so they can concentrate on completing as much as possible. Also, perhaps pair this person up with a super user who has completed training and can be a resource for answering questions.

Q-2: Is the certification training only for core users? Or is it for all users?

A-2: The University of FI$Cal certification program is for all FI$Cal end users. However, 2017 departments should first complete their required training.

Q-3: We have had a couple of users who have been told EACH core user must have 80% completion. I was told it was 80% as a DEPT. Which is the case?

A-3: It is 80% for the DEPT., not the individual.

Q-4: I submitted an FTA Request form last Monday with several new users who are still not on my review tab. When will they be getting their training email?

A-4: The University of FI$Cal Administrator, Joel, was in the meeting. He will follow up on this and make sure that happens within the next couple of days.

Q-5: So, CAN a user with View Only roles run reports?

A-5: We reviewed the **End-User Summary Role Description Handbook** and it appears that the “View Only” roles can only “View” (and run queries in some cases). Processors, Maintainers, Buyers, some Approvers, and a couple of Reporters can actually run reports. We have reached out to the Security Team to see if there are any exceptions to this. We will update this answer if this there is more to report.

Q-6: We have a mandate for the ISO and the CIO to approve some of the IT purchases. There are only two levels of approver, what do you suggest we do for that approval? It is not in the 1st or 2nd level. Also, how are others handling that ISO CIO approval?

A-6: We posed this question to the CMO Readiness Team. They will be contacting your department to discuss this issue.

2017 Release Training Liaison Web Meetings

Monday, April 24, 2017

Q-1: "Our Dept." has several users mapped to Read only roles. Some users were assigned training (just the introductory classes), and other users have not been assigned anything at all. Why is that, and is there any special classes besides the introductory courses for those read only roles?

A-1: Any users with "read only" roles should have access to at least the RPT101 optional class which links report topics from all modules. As these type of topics are identified they will be added to RPT101.

Q-2: I had one person who had a super user role assigned but now nothing is showing on her learning path. Can those classes be added back?

A-2: Learners that were assigned super user roles are not having the "all access" to FTA taken away and will be assigned their Summary/Security roles based on their individual roles and function.

Q-3: (Clarification of Q-1 above): Yes, I am talking about those roles. However, some users mapped only to those roles received FS101 and FS102. Others received nothing. If I look at the review tab, there are users without any training. If there is no training for those needing read only, how are they going to know how to look at anything in FI$Cal? (Answer to clarification was added to A-1 above.

Q-4: When is the new role mapping due?

A-4: TECH736 was just sent out by Readiness stating that role mapping is due on May 5.

Q-5: (This question was from Anthony Ampania with FI$Cal to the departments), "I would like to know how many departments would be ok with us sending an email to all end-users with the training schedule?"

A-5: While several departments did respond to please send the information to their end users, two departments responded that they would <u>not</u> want this email sent to their departments. We also stated that if any other departments do not want their people to get the email to please send a message to the FI$Cal CMO Mailbox and we would honor that request.

Q-6: Can you please tell us the time frame or where to go to see the ILT schedule and who can go when? Maybe I just missed it.

A-6: Anthony Ampania demonstrated how to access the schedule on the FI$Cal Web Site. Also, attached is the Link to the End User Training Schedule.

Q-7: Can the schedule be sent in Excel so we can filter for classes? The PDF is difficult to navigate.

A-7: The weekly report goes out in an Excel format and you can manipulate that for your needs.

2017 Release Training Liaison Web Meetings

Monday, April 17, 2017

Q-1: I want to clarify that the classes listed as optional on the learning paths are actually optional and do not count against the 80%

A-1: Yes. Only the required courses count toward the 80%.

Q-2: Is this for Core users and General users?

A-2: Only Core users' progress is being tracked toward the 80% completion requirement.

Q-3: The color legend does not correlate to the courses completed, we just look at the check mark.

A-3: The color legend correlates. The color legend goes off of the course level not the job profile level.

Q-4: What is the date that the secondary users will be able to take ILT courses?

A-4: They will be able to enroll starting Friday 4/21.

Q-5: When I look under the review tab for users' progress, I only see if they are 100% complete, how do I see the progress percentage?

A-5: Unfortunately, this is an all or nothing. Either they have completed or not completed.

Q-6: If a Training Liaison signs up a learner to take a class, will the FTA System send the learner an email?

A-6: Yes. Additionally, 3 days prior to the beginning of the class they will receive a reminder.

Q-7: The learners can sign themselves up too, correct?

A-7: Yes. And the learners can also withdraw themselves as well as long as it is more than 5 days prior to the start of class.

Q-8: When will Training Liaison access be available?

A-8: It is available now (Several learners stated they with not have access or that they could not see the "Review" tab. These issues were handled with the individual departments off-line).

Q-9: Do optional classes count towards the 80% we have to complete? (Same question as Q-1 above)

A-9: No

Q-10: What is the email address if we do not have access to the Review tab?

A-10: fiscal.cmo@fiscal.ca.gov

Q-11: Is there a report to see how the department is doing to reach the required 80%?

A-11: Yes, the first report will be sent out this Thursday, April 20.

Q-12: (a) If you do a "Know-It" portion of a class and fail, how do you re-do this portion? It only lets the user do "See-It" after they failed. (b) They failed because they did not understand how to move through.

A-12: (a) You should be able to go back and do your "Know-It" immediately. You can also click on "Actions" in the bubble while doing the "Know-It" and elect to close without scoring. (b) If they lacked understanding on how to move through the process, we suggest that all learners redo the FS101 and FS102 courses that tell all about FI$Cal and show how to navigate through the training courses.

Q-13: If the trainer enrolls someone, will the trainer receive the email too? Also, if the trainee removes themselves from class will the trainer receive an email?

A-13: The answer in both cases is, no, not at this time. Also, it is recommended that, in the event a learner removes themselves from a course that they immediately remove it from their calendar. FI$Cal does not automatically do this. If the learner un-enrolls from a future class and does not remove it from their calendar they may inadvertently attend this un-wanted course.

Q-14: Where do we find a comprehensive list of ILT courses?

A-14: The Release 2017 Training Schedule is found at http://www.fiscal.ca.gov/release_2017-2018_resources/R17Training.html. Click on the 2017 Release End User Training Schedule link.

Q-15: Are there any training that are ILT only?

A-15: Instructor Led Training courses (ILT) have a classroom component as well as a web based training (WBT) component.

Q-16: What about travel, can learners request travel if they cannot attend a local session?

A-16: We have sessions in hubs around California. If you are unable to attend one of the sessions near you department, for what-ever reason, then we recommend that you take the course as a WBT. Either way, your department bears the cost of travel.

Q-17: Is anyone reading the comments we post in the evaluation for each training?

A-17: Yes. The WBT comments are reviewed periodically and published in a report. Once the ILTs begin, there will be weekly reports that go out for these statistics and comments.

Q-18: Could the Training Liaison get a listing of all classes (in excel spreadsheet) assigned to all of our end users so that I could verify that they were assigned to the correct classes? We don't want to have to check each end user's classes through the Review option, one end user at a time.

A-18: These reports will be going out each Thursday afternoon beginning this Thursday 4/20.

Q-19: Some of our end users were assigned to roles and classes that were not listed on the TECH730 role mapping document. Why are we responsible for removing those classes from their accounts and not FI$Cal since it was their mistake?

A-19: We only loaded Super Users and TECH730 role-mapping. We removed all other learning paths except Statewide Budgeting. We will validate the upload.

Q-20: We have end users who are assigned 46 classes for the Accounting Super User Learning Path. These Super Users will only have Asset Management module roles. Could I remove the other classes, other than Asset Management classes from their learning path, and still retain them as Super Users?

A-20: We will be removing the Super Learner's Learning Paths so they just concentrate on their go-live training. Any courses they have completed will be a part of their transcripts so they never have to re-take the class. All learners also have access to the course catalog for all classes.

2017 Release Training Liaison Web Meetings

Monday, April 10, 2017

Q-1: Some of our users did not get e-mail letters for training. We updated the list and an older list seems to have been used. What do we do to get the people registered?

A-1: Please email us at fiscal.cmo@fiscal.ca.gov with details.

Q-2: Could you place that email in the “notes” for me?

A-2: The address is: fiscal.cmo@fiscal.ca.gov.

Q-3: Can core users start taking the FTA courses or need to wait until May 2?

A-3: They have access to start taking web based training (WBT) immediately. We recommend that they complete FS101 and FS102 first.

Q-4: I know that I sent a bad e-mail address – it had a typo – how do I fix that?

A-4: Use the FTA Training Maintenance Request Form.

Q-5: Where do we find the FTA Training Maintenance Request Form?

A-5: It can be found in the TRNG705 task. I have included the link here. FTA Training Maintenance Request form.

Q-6: I need to add an individual to the FTA effective immediately for all training modules for Budget and Accounting. Can I do that now? If so, what are the processes?

A-6: Please submit the FTA Training Maintenance Request form with the training roles desired.

Q-7: Are training liaisons only supposed to have the "Instructor" link and not the "Manage" link upon signing into to FTA?

A-7: Training Liaisons have the Review tab as part of their role to view the transcripts for the learners from their departments. If the Training Liaison also was part of the Train the Trainer effort they would have the Instructor tab.

Q-8: I also need to add a backup department liaison, will I be able to do this here too?

A-8: Please email fiscal.cmo@fiscal.ca.gov with the request.

Q-9: I’m unable to see all my super users training percentages as the department liaison. Has there been a change to that?

A-9: As a training liaison you have the Review tab. Under the Review tab click on Assigned Group Review. Click on the Toolbox for the learner and it will show the completion status (0% or 100% if completed). If you do not see the Review tab and are a Training Liaison, please email us at fiscal.cmo@fiscal.ca.gov.

Q-10: If I understand correct, those in our Department who need to be trained (super users) will receive an invite to register to train in the FTA in the next week or so?

A-10: Welcome letters to Core learners went out early April 2017. Welcome letters for Secondary learners go out April 21, 2017. You can update learners by submitting the FTA Training Maintenance Request Form.

Q-11: Will I receive weekly reports even if we have not submitted the TECH730?

A-11: Probably not because no learners will be mapped to the Release 17 learning paths. This happens after we receive your role mapping sheet (TECH730).

Q-12: In the FTA Review tab, I can see my group but not myself. Is there a reason I cannot see the summary of my own training courses?

A-12: You can't see your own because you don't supervise yourself. However, you can see your progress and summary by going to your "Learning Path" in the "Career Development" dropdown in your FI$Cal Training Academy menu.

Q-13: Will the recording of this Web Meeting be posted?

A-13: No, but the questions asked will be addressed by email and also added to the FAQs on the FI$Cal Website.

Q-14: Why don't the icons change colors as indicated on the pdf to show completion, and can I just do the "See-It"? Do I have to do the "Try-It?"

A-14: There could be several reasons you aren't seeing the color updates showing completed. It could be that you just need to refresh your screen. If this doesn't work, usually it is due to not completing a survey or not completing the required "Try-It", or "Know-It". This could also happen if you didn't click on each "Concept" pane so that they are all "grayed" out. The FTA Course Troubleshooting Guide can be found on the home page of the FI$Cal Training Academy (FTA) also listed here.
http://mss.netdimensions.com/mss/nd/fresco/repository/EKP000261815.pdf