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 6^{th}, 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 1^{st} or 2^{nd} 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 <u>Link to the End User Training Schedule</u>.

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 Fiscal 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