Statewide Procurement Multi-User Access Request Form –
Submit Updates to Role Assignments for Statewide Procurement Roles
MUST BE SUBMITTED VIA DEPARTMENTAL AUTHORITY OR DESIGNEE (DAD)

Complexity

☐ Significant Effort Required ☑ Moderate Effort Required ☐ Little Effort Required

Function Completing For

☑ Department Function ☑ Control Function

Resources

- All Department Implementation Team members
- Department Subject Matter Experts (SMEs)

Applicable Departments

- Future Release, Deferred, and Exempt Departments

Overview

Departments can update role mapping for Statewide Procurement roles via the Statewide Procurement Multi-User Access Request Form (MARF), previously known as the TECH271b Response Template. All updates will be processed by the FI$Cal Service Center.

Note: All Role Mapping submissions must be received by the FI$Cal Project from the Departmental Authority or an authorized Designee at your department. Designees cannot request roles for themselves. In the event that roles must be assigned to a Designee, the Statewide Procurement Multi-User Access Request Form must be submitted by a Departmental Authority. A copy of the Departmental Authority and Designee (DAD) Form is available on the Access FI$Cal page of the FI$Cal website at: **http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/index.html**.

Action Required

It is the responsibility of the Department Liaison to coordinate who will be completing each of the items involved with this activity.

Instructions
1) Read this Statewide Procurement Multi-User Access Request Form Instructions document.
2) Open the Statewide Procurement Multi-User Access Request Form in Excel posted on the FI$Cal Service Center page of the FI$Cal website http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/index.html.
3) On the ***Department Role Mapping*** worksheet, fill out the end-user information in Columns A-J. **Note:** Fields with an asterisk (*) are required. ***DO NOT*** include placeholders for vacant positions at your department.
a. In Column H, ***Job Classification,*** enter the State classification of the end user (for example, Staff Services Manager I, Associate Information Systems Analyst).
b. In Column I, ***State Employee?***, enter "***Yes***" if the end user is an employee of the State and "***No***" if the end user is not an employee of the State (for example, a contractor).
c. In Column J, ***Previous end user of FI$Cal? If yes, provide the old email address(es) used for access***, enter the previous email(s) used to access FI$Cal if this user joined your department from another department currently using FI$Cal.
4) On the ***Department Role Mapping*** worksheet, update FI$Cal end-user roles for end users in Columns K-Q.
a. In Column K, ***New User,*** mark with an uppercase "***X***" if the end user in this role is being added for the first time.
b. In Column L, ***Remove User,*** mark with an uppercase "***X***" if the end user is being completely removed.
c. In Columns M-Q, review the list of FI$Cal end-user roles.
d. Assign the desired FI$Cal end-user roles to a user's profile by entering an uppercase ***"A"*** in the appropriate row.
e. Remove an already assigned FI$Cal end-user role from a user's profile by entering an uppercase ***"R"*** in the appropriate row.
f. Column R, ***Total Roles Changed***, is for reference only and provides a count of the total number of roles changed for each end user. This is an auto-populated field and updates automatically.

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5) On the ***Department Role Mapping*** worksheet, fill out Business Unit access information in Columns S-U.
a. In Column S, ***Primary Business Unit***, select the end-user's main business unit from the drop-down list.
b. In Column T, ***Additional PeopleSoft Business Unit Access?***, enter any and all additional business units (BUs) for which the end user performs contracted services or requires access. If all Wave 2 BUs are required, enter "All Wave 2 BUs." If all BUs are required, enter "All Wave 2 and non-Wave 2 BUs." i. To add additional PeopleSoft business unit access for existing users, enter "***ADD: [BU]"***. ii. To remove previously assigned PeopleSoft business unit access for existing users, enter "***REMOVE: [BU]"***. iii. Separate multiple BUs with a comma ("**,**").
c. In Column U, ***Notes/Explanations for Role Assignments,*** add any comments regarding the assignment of roles.
Note: An end user can only have one set of roles per User ID. If an end user needs different roles across two or more business units, **repeat steps 3-5 of these instructions, making sure to provide a different email address.** This will allow the end user to have 2 separate User IDs.
6) On the **CSCR Workflow** worksheet, provide workflow routing information for CSCR approvers. Note: If the CSCR workflow information is not provided, transaction approval routing will not be configured.
a. Add all end users, by email, assigned to the Non-FI$Cal Department CSCR Approver role. i. Enter the end user's email address into Column B, ***Email Address***, on the ***CSCR Workflow*** worksheet.
b. In Column C, ***Update to Existing User?***: i. Select "***Yes***" if the entry is an update to an already mapped end user. ii. Select "***No***" if the entry is for a new end user.

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c. In Column D, ***Acquisition Type***, select the ***Acquisition Type(s)*** applicable to the end user from the drop-down list: i. Select "***IT Goods***" if the end user will approve only this acquisition type. ii. Select "***Non IT Goods***" if the end user will approve only this acquisition type. iii. Select "***IT Services***" if the end user will approve only this acquisition type. iv. Select "***Non-IT Services***" if the end user will approve only this acquisition type. v. Select "***IT Telecom***" if the end user will approve only this acquisition type. vi. Select "***All Acquisition Types***" if the end user will approve all the acquisition types listed above. **Note:** If an end user approves for multiple but not all ***Acquisition Types*** (for example, Non-IT Goods and Non-IT Services, but not IT Goods and IT Services) create a second row for the end user, entering a different acquisition type for each row.
d. In Column E, ***Notes/Explanations for Approval Workflow Assignments,*** add any comments regarding the mapping of workflow for CSCR approvers.
7) On the **COVER** worksheet, enter the name(s) of the individual responsible for completing the worksheets and submitting the overall workbook.
8) Submit **via Departmental Authority or an authorized Designee** the Statewide Procurement Multi-User Access Request Form to the FI$Cal Service Center at **fiscalservicecenter@fiscal.ca.gov**. **Note: All submissions must be received by the FI$Cal Project from the Departmental Authority or an authorized Designee at your department**. Before submitting your department's Statewide Procurement MARF, save it with the current date in the document name (DeptName_ StatewideProcurement_MARF_YYYYMMDD).

Supporting Materials & Resources:

- Statewide Procurement Multi-User Access Request Form Instructions (this Word document)
- Statewide Procurement Multi-User Access Request Form – Current Version is on FSC Website
- FI$Cal End User Role Description Handbook – Current Version is on FSC Website
- Departmental Authority and Designee (DAD) Form
- FI$Cal Service Center – fiscalservicecenter@fiscal.ca.gov

Appendix A: Wave 4, Deferred, and Exempt Department Roles

Role Name	Role Description	Related Business Processes	Role Responsibilities	Relationships with other Roles
Department SCPRS Processor	Future Wave, Deferred, and Exempt department user from a department not in FI$Cal who can record FI$Cal SCPRS transactions.	• Manage Purchase Orders	• Enter order and contract information in FI$Cal SCPRS	• Includes additional access associated with the Vendor Viewer and the Department PO Reporter roles • Department Vendor Processor role may be requested for the SCPRS Processor
Department Vendor Processor	The department end user who creates a new vendor or adds/modifies vendor address and contact information.	• Enter and Maintain Vendors	• Create New Vendor • Search For Vendor • Update Vendor Information • Receive Notification of Approval • Receive Notification of Update to Vendor Record • View Vendor History • Add and view Attachments	• Creates and updates vendors for review and approval by Central Vendor Approvers • Includes additional access associated with the Vendor Viewer role • Can be combined with Confidential User to add/update confidential vendor information
Non-FI$Cal Department CSCR Processor	Future Wave, Deferred, and Exempt department users who will post solicitations and progress payments in California State Contracts Register CSCR.	• Manage Purchase Orders	• Enter solicitations for posting to CSCR • Enter progress payments for posting in CSCR	• Includes additional access associated with the Vendor Viewer and Department PO Reporter roles • Creates entries for CSCR that are sent for approval by the CSCR Approver prior to posting • Receives denied transactions from Approvers that may need modification and resubmission prior to posting

Role Name	Role Description	Related Business Processes	Role Responsibilities	Relationships with other Roles
Non-FI$Cal Department CSCR Approver	Future Wave, Deferred, and Exempt department users who will approve entries prior to posting solicitations in CSCR.	• Manage Purchase Orders	• Approve solicitations for posting in CSCR	• Includes additional access associated with the Vendor Viewer, Non- FI$Cal CSCR Ad Hoc Approver, and Department Event Approver roles • Approves entries submitted by CSCR processor • May deny items for posting that will go back to the CSCR processor
Non-FI$Cal CSCR Ad Hoc Approver	Future Wave, Deferred, and Exempt department users who will approve entries prior to posting solicitations in CSCR on an ad hoc basis.	• Manage Purchase Orders	• Approve solicitation for posting in CSCR on an ad hoc basis	• Includes additional access associated with the Vendor Viewer and Department Event Approver roles • Approves entries submitted by CSCR Processor • May deny items for posting that will go back to the CSCR Processor
Vendor Viewer	The central and department end user who will be able to view vendor information.	• Enter and Maintain Vendors	• View Vendor Information • Search for Vendor • View Vendor History • View Vendor Conversations	• Can view vendors entered by the Department Vendor Processor or the Central Vendor Processor • Can be combined with Confidential User to view confidential vendor information • Attachments are not visible

Role Name	Role Description	Related Business Processes	Role Responsibilities	Relationships with other Roles
Department PO Reporter	The department end user who has access to run procurement reports for their department.	• Manage Purchase Orders	• Manage Requisition Reports • Manage Purchase Order Reports • Manage Receiving Reports • Manage P-Card Reports • Manage Encumbrance Reports	• Creates and runs reports that may be shared with department end users • Can be combined with Confidential User to add/update confidential purchasing information
Department Event Approver	The department end user that approves solicitation events.	• Manage Sourcing	• Approve sourcing event prior to posting	• Includes additional access associated with the Department Event Ad Hoc Approver • Receives events for approval from the Event Buyer • Denies events that go back to the Event Buyer for modification and resubmission • Inserts Ad Hoc Approver as needed
Department Event Ad Hoc Approver	The department end user that can be inserted as an approver as needed.	• Manage Sourcing	• Approve sourcing event prior to posting on an ad hoc basis	• Receives events for approval from the Event Buyer • Denies events that go back to the Event Buyer for modification and resubmission