

Bon Voyage, Legacy!

A message from Navin Arora, Deputy Director, Service Center and Portfolio Management



With the clear-cut strategy of putting our customers first, the Department of FI\$Cal is committed to delivering value and solutions around your department's needs. The state of California now has a common financial management system that is tailored for the users and by the users.

We worked with you to extract requirements from legacy systems and brought in the relevant technology, processes and human capital as building blocks that got us to this moment. Your tireless efforts and willingness to take this leap and become a part of FI\$Cal is commendable. We are now "One state. One system." And you are part of our team.

Because this was the largest departmental release in our history, we are extending operation of our Go Live command center to channel requests to the most effective solutions. We will continue to deliver on-site support, help

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Use ServiceNow Online Ticketing Portal

ServiceNow is the best way to contact the FI\$Cal Service Center (FSC) when you encounter issues you can't resolve through job aids, consulting with super users or attending User Support Labs. ServiceNow is available on the FI\$Cal system home page when you're logged in. The portal was recently updated to include buttons that guide the user through the ticketing process to request a change or report an issue.

We encourage all system end users who need to contact the FSC to use the ServiceNow portal, where you can

create a well-documented ticket. Once your ticket is submitted, ServiceNow allows you to check the status through assigned case numbers. ServiceNow also features a searchable database of knowledge articles.

The Department of FI\$Cal has a variety of user support options including User Support Labs, job aids, and self-service features. [See page 4](#) of this issue for more information. Our FSC is available five-days a week to resolve more difficult issues.

[Watch the video](#) for a preview of ServiceNow.

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FI\$Cal Service Center Ticket Volumes Lower After Go Live

Compared to previous releases, ticket volume through the FI\$Cal Service Center (FSC) is lower this year despite the addition of 64 new departments and about 8,000 new users into the system. This is mainly due to teamwork and preparation for the final release.

FI\$Cal has put a strong, collaborative team in place to monitor and assist department users. This team is composed of readiness coordinators and floaters from various divisions who are providing on-site support to departments.

“We just want to keep driving home the point to reach out to your super users,” said Maureen Rielley, FSC Level 1 manager. “For new departments, a lot of tickets are how-to questions that can be addressed by super users or by reviewing [job aids](#) and [videos](#).”

The FSC also requests specifics on tickets. When submitting a ticket to the FSC, provide sufficient documentation and screenshots so the analyst can identify the issue without having to request additional information, potentially delaying the resolution.

Career Opportunities

Administrative Services Division

- **Staff Services Analyst**
Administrative Services Division
Final filing date: August 7, 2018

Service Center and Portfolio Management Division

- **Information Technology Associate**
FI\$Cal Service Center,
Level 2 Services Unit
Final filing date: August 6, 2018

For the most current list of career opportunities, visit the [CalCareers website](#).

Updated FI\$Cal Job Aids

Module	Job Aid Title	Job Aid Description	Date Published
N/A	Home Page Navigation Functionality in FI\$Cal 2.0	This Job Aid familiarizes end users with the new PeopleSoft Fluid User Interface (UI) in FI\$Cal. It allows them to choose the Navigation Menu they wish to use in FI\$Cal.	07/26/2018
Accounts Payable	Inserting FI\$Cal Chartfield Values into CalATERS 4.0	Provides instructions for: 1) Guide CalATERS users on how to include FI\$Cal Service Location Chartfield value when applying Specialized Account Coding to a CalATERS expense claim; 2) Guide Department AP Maintainers on how to create SpeedCharts for use with CalATERS transactions; 3) Guide CalATERS users on how to insert SpeedCharts to a CalATERS expense claim.	07/24/2018
Cash Management	Manually Reconciling Bank Side Transactions 2.0	Provides Bank Statement Reconciliation Processors the instructions for manually reconciling Bank side transactions.	07/24/2018
Procurement	How to Create an RTV for Multiple PO Distribution Lines 2.0	Provides the Department RTV Processor the instructions to complete a split-distribution return to vendor transaction.	07/24/2018
Accounts Payable	Escheatment Processing 2.0	Provides instructions on escheating check payments.	07/24/2018
Procurement	Using Standard Comments to Insert Statewide General Provisions on a PO 2.0	Provides Department Buyers and PO Buyers with instructions for inserting Department of General Services (DGS) Statewide General Provisions on POs.	07/23/2018
Procurement	Using Standard Comments in a PO 2.0	Provides Department Buyers and PO Buyers with instructions for entering standard comments in Purchase Orders at both the Header Level and Line Level.	07/18/2018
Chart of Accounts, General Ledger, GL Conversions, & Year-End Close	Maintaining Department COA Values 3.0	Provides the Department COA Maintainer the instructions for creating new ChartField Values.	07/13/2018

To view all new and updated job aids, or to join our subscription list, visit the [FI\\$Cal Job Aids page](#).

Pride in Customer Service Marks Her Long Tenure at FI\$Cal

Six years may not seem like a long time. But for Maureen Rielley, Level 1 support manager in the FI\$Cal Service Center (FSC), many changes have taken place since she started work at FI\$Cal in 2012.

With the just-completed 2018 Release, Maureen is one of the few employees who has seen the department evolve from an office of fewer than 100 people to what it is today. It makes her very proud.

“It is exciting to come full circle, a huge accomplishment, both personally and as a department. There’s a lot of pride in knowing that hard work and dedication and perseverance have contributed to the overall success of FI\$Cal.”

Maureen recalls leading the pre-wave release in 2013. “It was the first Go Live, which implemented requisitions, purchase orders and receipts to five pre-wave departments.” In Wave 1, Maureen led the FI\$Cal Vendor Management Group. She and her team added some 50,000 vendor records manually.

She calls her current management job in the FSC a “hodgepodge” that includes helping manage Level 1 tickets and Cal eProcure customer requests.

“With Cal eProcure, we help bidders and suppliers with registration, applying for small business certification, troubleshooting the site, account profiles and other issues,” she says.



Maureen enjoys helping people through customer service, and she’s gained satisfaction from doing that on her job.

“Now the challenge is being there for our customers, identifying and working through issues and improvements to the system,” she says when asked what happens next. “I like to think our service center is more personal, with exemplary service. I work to maintain and improve that going forward.”

What does she like most about working at FI\$Cal? “My team and the other people I work with,” she says without hesitation.

During her off-work time, Maureen still indulges in some of that passion for helping people by teaching Sunday school to 4- and 5-year-old children.

Maureen is also an avid golfer and card player. At home, she is known as the “Canasta queen.”

ISS Portal for Access Request

Reminder! DADs please use the [ISS portal](#) for access/provisioning requests such as creating, changing or deleting users. Log in with your primary FI\$Cal production user ID and password.

End User Spotlight



Each month we ask our end users a question to get to know you better.

Lee Sutter works as an accounting manager at the Department of State Hospitals (DSH). He is currently using FI\$Cal to validate accounts and cutover data transactions, while configuring the system to get it ready for DSH end users to transact in FI\$Cal.

Q: What class did you take in school that helps you in your job?

A: Since I work as an accounting manager, any and all of my accounting classes and probably oral and written communications classes have helped me the most in my job.

Online Learning Resources for End Users

Job Aids

Supplemental [job aids](#) provide step-by-step instructions for common transactions. Users can [subscribe](#) to receive job aids on specific topics.

University of FI\$Cal

The [University of FI\\$Cal](#) contains general tutorials on various business transactions as well as a certification program that provides end users an opportunity to further their FI\$Cal system education.

How-To Videos

FI\$Cal [how-to videos](#) on YouTube are designed to help address common issues and frequently asked questions. Subscribe to our [YouTube page](#) to get instant access to our videos as soon as we post them.

LinkedIn User Group

End users have a special group on LinkedIn where they can learn from each other and get helpful hints on training tools plus other information affecting their job functions. To join, you must sign into a LinkedIn account that lists your current employment so we can verify you are a FI\$Cal user. Join the [LinkedIn Super User Group](#) from the [Super User Community page](#) on the FI\$Cal website.

2018 User Support Lab Reminder

User Support Labs (USL) for 2018 Release departments are continuing through the end of September. These labs give end users from our newest departments the opportunity to get post-Go Live support from FI\$Cal subject matter experts while processing real work transactions in FI\$Cal. Instructions on how to request participation in a USL are available on the [2018 USL Request Form](#). If you have questions regarding the 2018 Release department USL sessions, please email FI\$Cal's [Change Management Office](#).

End users from previous waves and releases can continue to receive help through ongoing [User Support Labs](#) managed by FI\$Cal's On-Site Support Office.

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month-end and year-end close, and provide technology and process innovations to make the FI\$Cal system work for you. Please stay in contact with your readiness coordinator, take advantage of [self-service tools](#), and learn from the super users in your own department.

We are committed to helping you achieve your financial management goals by providing excellent customer service through the FI\$Cal Service Center (FSC). Please contact the FSC by phone (855) 347-2250, or email fiscalservicecenter@fiscal.ca.gov, or from the ServiceNow portal while logged into your profile.

Finally, thank you for taking this journey with us. Together, we will say "bon voyage" to our legacy systems and hello to the future. Your participation in the system means greater accountability for the way the state spends taxpayer dollars.

AUGUST 2018 EVENT HIGHLIGHTS

NEW IN AUGUST!

All-New ServiceNow Portal Launched

A new and improved ServiceNow portal site is available when logged into FI\$Cal. To preview new features, view the [ServiceNow video](#).

UPDATED MONTHLY

FI\$Cal Production Release Notes

Be sure to check for [Production Release Notes](#), which are updated monthly.

AUGUST 23

Monthly FI\$Cal User Community Forum

Thursday, August 23, 2018

Department of Consumer Affairs
2005 Evergreen Street
2nd Floor, Emerald Auditorium
Sacramento, CA 95815

For more information, please visit the [FI\\$Cal website](#).

For the latest information, please visit the events calendar on the [FI\\$Cal Resources Page](#).