

## Preparation Activities Scheduled

*A message from Neeraj Chauhan, Chief Deputy Director*



Last month, 60 end users from our 2018 Release departments gathered in Southern California for a day of intensive training. The enthusiasm of our SoCal end users invigorated the FI\$Cal team, and we look forward to the next steps we'll take with you as you enter the system. We have a structured schedule of activities starting this month that will help your department with onboarding in July.

In this issue of the Focus, you'll read about **Dry Run** validation ([page 3](#)), during which super users have a chance to see what the data looks like in the system. In order to participate in these validation sessions, it is important to meet the May 7 data upload deadline.

Take the time between data upload and the start of May 24 Dry Run validation activities to have all of your super users and end users complete **University of FI\$Cal** training ([page 1](#)). Completing the training will help familiarize you with system navigation, so you get the most out of Dry Run and a jump on how the system works once you're in.

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## 2018 Release End User Training

With FI\$Cal's July release a little over two months away, 2018 department end users should be making sure they are taking the training courses that will allow them to gain the foundational knowledge and skills needed to perform transactions in the system after Go Live.

Some departments requested early access to the **University of FI\$Cal** (UF) and their end users were given UF accounts and have been training for several months. In April, emails were sent to the remaining 2018 department end users that included a user ID and password giving them access to their UF account. Through online UF course curriculum, end users practice simulations of the work aligned to their FI\$Cal end user role(s).

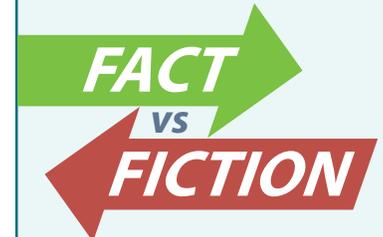
End users identified by their departments as core users can view their specific Learning Path once they access their UF account. Each Learning Path of required courses is based on the role(s) the end user will have in FI\$Cal. Core users should have all their assigned courses completed by June 29 to be ready for the July release.

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# Wearing Pride on Her Sleeve

When Karen Geiger goes to work, her colleagues know what she's going to be wearing before she even comes into her office. She's the one sporting a FI\$Cal shirt. Maybe underneath her FI\$Cal coat. Or maybe it will be her FI\$Cal sweatshirt.

Karen doesn't skip a beat. Every day on the job, she's donning at least one of her nine pieces of clothing that bears the FI\$Cal logo.

"At least I don't have to worry about what to wear in the morning," she quips.

She's been wearing some kind of uniform most of her life. "I'll never forget when my parents couldn't afford my Brownie uniform as a little girl," she says. "I think that's where the pride started, because when I became a Girl Scout, I wore that thing everywhere."



Growing up in central Pennsylvania, Karen also loved wearing her safari uniform while working at a zoo called Reptiland. The notion stuck. She enlisted in the Air Force and learned to keep

her uniform spick and span for four years. The pride grew, and that's what she carried with her into her state service at FI\$Cal, which started three years ago.

When is she noticed most? That would be when she wears one of her neon green or yellow shirts. "It's

funny because half the people love them and the other half go whoa!" she says. They say, 'I can see you' and I say, 'No, you can see my shirt!'"

Karen also takes pride in her practicality — she's not spending a lot for her wardrobe.

As California's state and local employees celebrate Public Service Recognition Week, Karen serves as an inspiration — a dedicated employee who wears her FI\$Cal pride everyday on her sleeve.

## New Dashboard Provides Insights on Department Performance

The Department of FI\$Cal recently launched a new Operational Insights Dashboard. This powerful tool allows end users to get insights into how well their own department is performing based on selected fiscal year, accounting period and module.

This dashboard provides summary and detail view of transactions at different levels with drill-down capabilities to enable tracking of processes across modules/business processes. With this tool, users can:

- Have visibility to the level of transactions by module and by status
- Review a listing of journals created by status
- Review transactions in error or not sent to GL

Department liaisons recently were notified about the dashboard, and super users will be hearing more about it soon. A presentation at the next Super User Town Hall set for May 2 will provide an overview.

A [job aid](#) explains in detail how to use this tool. Users with questions or who need training on the new Operational Insights Dashboard should contact the On-Site Support Office at [OSSO@fiscal.ca.gov](mailto:OSSO@fiscal.ca.gov).

## FI\$Cal How-To Videos

Visit our [YouTube](#) page to get answers to commonly asked questions. Featured videos include:

- [How to Access the ServiceNow Self Service System for the first time](#)
- [How to Create a ServiceNow Self Service Ticket](#)

## Monthly FI\$Cal User Community Forum

**Next Forum in June**

# 2018 Release Transition Meetings Start End of May

Transition meetings for 2018 Release departments will begin in late May. During these meetings, FI\$Cal will share important information with departments regarding Cutover instructions, FI\$Cal system freeze dates, working with the FI\$Cal Service Center, and more.

The transition meetings will be held both at the FI\$Cal office in the Emerald Room and via webinar. Department liaisons will receive

email notices for each meeting and should identify participants from their departments to attend.

There will be frequent and rapid changes in the weeks leading up to the July Release. It is important that every onboarding department have a representative attend each transition meeting so their department is fully informed and prepared for the changes occurring before and after Go Live.

If you have questions regarding the upcoming transition meetings, please contact your readiness coordinator.

## Dry Run Begins for 2018 Release Departments

Preparations for the July Release are in full swing. As part of those efforts, 2018 departments will be going through Dry Run and Dress Rehearsal activities to work through remaining data conversion issues before Go Live.

2018 Release departments will submit their conversion files through FI\$Cal's Self Service Conversion Portal from May 2 through May 7. As the files are processed, departments will receive feedback through the portal to ensure that the files meet the minimum quality threshold for Dry Run. Once quality thresholds are met for staging and validation processing, the data will be loaded into a conversion test environment and departments will come to FI\$Cal headquarters and validate their data.

The Dry Run validation sessions, scheduled May 24 to June 1, will offer a hands-on opportunity

for subject matter experts from onboarding 2018 departments to verify the accuracy of their conversion data files and transactions as they will appear in the FI\$Cal system. The 2018 Release departments with planned manual conversions will also have an opportunity to test manual entry of their transactions during Dry Run from June 4 to June 8.

Following the Dry Run, departments will move on to the Dress Rehearsal phase, which will take place in mid-June. During Dress Rehearsal, departments will resubmit their conversion files and validate their data one last time before cutover and migration to the FI\$Cal system.

FI\$Cal's Change Management Office will send invitation emails once all details have been finalized. If you have questions please contact your readiness coordinator.

## Career Opportunities

### Service Center and Portfolio Management Division

- **Information Technology Associate (Limited Term)**  
FI\$Cal Service Center, Level 2 (L2) Services Unit  
*Final filing date: May 14, 2018*
- **Information Technology Associate (Multiple Positions)**  
FI\$Cal Service Center, Level 2 (L2) Services Unit  
*Final filing date: May 14, 2018*
- **Information Technology Specialist I**  
Enterprise Quality and Testing Section  
*Final filing date: May 14, 2018*

### Information Technology Division

- **Information Technology Associate**  
Transition and Operations Services Office, Internal Applications Unit  
*Final filing date: May 11, 2018*
- **Information Technology Specialist I**  
Transition and Operations Services Office, Operations Services Section  
*Final filing date: May 11, 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 |
|---|---|--|----------------|
| Asset Management                                | <a href="#">Correctly Classifying Items as Assets in FI\$Cal 2.0</a>  | Provides instructions for classifying items as assets on a Requisition or purchase order.  | 04/05/2018     |
| Asset Management, Accounts Payable, Procurement | <a href="#">Purchase Order (PO) to Accounts Payable (AP) to Asset Management (AM) for Capital Asset 2.0</a> | Provides users with instructions needed to: <ul style="list-style-type: none"> <li>• Set up a PO for a capitalized asset</li> <li>• Follow through with the voucher (payment) in AP</li> <li>• Show the asset integrated to the AM module</li> </ul> | 04/10/2018     |
| Procurement                                     | <a href="#">Adding Sales Tax for Out of State Ship To Locations on Purchase Orders 2.0</a>                  | Provides FI\$Cal buyers adding sales tax for out of state ship to locations on purchase orders.  | 04/23/2018     |
| Procurement                                     | <a href="#">Purchase Order (PO) to Accounts Payable (AP) to Asset Management (AM) for Capital Asset 2.0</a> | Provides users with instructions needed to: <ul style="list-style-type: none"> <li>• Set up a PO for a capitalized asset</li> <li>• Follow through with the voucher (payment) in AP</li> <li>• Show the asset integrated to the AM module</li> </ul> | 04/10/2018     |
| Procurement                                     | <a href="#">Change Order for PO 2.0</a>   | Provides the user with instructions on how to create a change order for a dispatched PO.   | 04/19/2018     |
| ServiceNow                                      | <a href="#">Accessing Accenture ServiceNow Knowledge Base Articles 1.0</a>                                  | Provides FI\$Cal end users the instructions for accessing the Self Service Portal in order to locate knowledge base articles, which provide answers and step-by-step solutions for common issues.  | 04/09/2018     |

You may view all new and updated Job Aids [here](#).

## End User Training

*Continued from Page 1*

All secondary users will need to review the [Roles to Courses Mapping Matrix](#) to identify their role-based courses and self-register for them using the UF course catalog. The Enroll in a Course job aid located within the UF contains more information on the course catalog and self-registration.

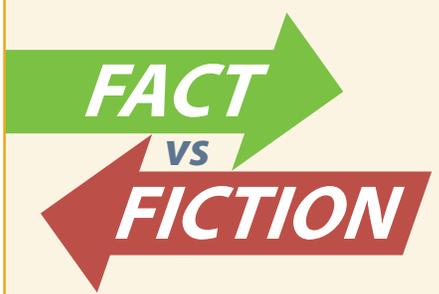
In addition to UF training, classes have been scheduled in May and June for 2018 departments who requested instructor-led training

(ILT) classes on the February TRNG817 survey. Individuals identified by their department to attend ILT will receive an email with the class session information.

If you have questions regarding 2018 Release end user training, contact your department's FI\$Cal training liaison and/or your department liaison.

FI\$Cal's training staff will be monitoring the training completion progress of each 2018 department

and are available for assistance as departments work through their FI\$Cal curriculum. You can contact them through the [CMO mailbox](#).



**FICTION:**

There is a departmental release planned for 2019.

**FACT:**

2018 is the last planned departmental release. This information is outlined in Special Project Report 7.

### FI\$Cal Production Release Notes

Production Release Notes are brief, high-level descriptions of enhancements and defect fixes in the FI\$Cal application. The Release Notes include date of deployment, relevant incidents or ticket numbers, the modules or business areas impacted, and the Operational Decision Making Framework (ODMF) numbers, when applicable. You may view all Production Release Notes [here](#).

## Preparation Activities Scheduled

Continued from Page 1

Following Dry Run validation, FI\$Cal will begin **transition meetings** (page 3) that detail final steps through cutover and into transition. Make sure to have a representative at each of the sessions.

July is just around the corner, but it is not too late to become as prepared as possible. We appreciate your effort, and thank you for the tremendous amount of work you have already completed. Please take full advantage of all preparation activities, and do not hesitate to ask questions about any of this month's activities via our [change management mailbox](#) or your readiness coordinator.

## DGS Partner Business Executive Roger Anderson Retires

Roger Anderson, Partner Business Executive for the Department of General Services (DGS), retired in April after 15 years of state service.

Roger helped shape the direction of FI\$Cal through his work as the on-site Impendent Project Oversight Consultant for the Department of Technology and as the DGS PBE for FI\$Cal appointed in 2014.



Among his many accomplishments, he negotiated several information technology contracts that saved the state millions of dollars and he championed the implementation of the Cal eProcure portal, which was designed to improve the experience of businesses selling products and services to the state.

Roger's retirement plans include volunteering, traveling, enjoying the company of his family and friends, and tackling all of his "new house" chores.

His outstanding efforts have helped make the implementation of FI\$Cal a success.

Thank you, Roger!

## MAY 2018 EVENT HIGHLIGHTS

MAY 1 – JUNE 1

### Department Validation Sessions Continue

Validation sessions continue through May until June 1. For the latest information, check the Events Calendar on the FI\$Cal [Resources Page](#).

MAY 2

### Super User Town Hall

9 a.m. – 12 p.m.

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

MAY 6–12



**PUBLIC SERVICE**  
RECOGNITION WEEK

**Honoring Our Public Servants.  
Connecting Citizens with Their  
Government.**

[Click here for more information.](#)

MAY 28



MAY 29

### 2018 Release Transition Meetings Begin

Transition meetings for 2018 Release departments will begin on May 29 and run through June. [See the article on page 3 of this issue.](#)

MAY 18

LOG YOUR COMMUTE, ERRAND AND RECREATION MILES AT  
**MAY IS BIKE MONTH.COM**

**RIDE YOUR BIKE DURING THE MONTH OF MAY**

**BIKE TO WORK DAY  
FRIDAY, MAY 18**

For the latest information, and to see the full schedule of Touchpoint Meetings, please visit the Events Calendar on the FI\$Cal [Resources Page](#).