

[Contents](#)

Cal eProcure Functionality..... 1

FI\$Cal Procurement 2

CSCR Tips - CMO sent to DLs on 2/23/2016..... 3

Attachment - UNSPSC Docume..... 5

Attachment - Viewing Bidders Who Accepted Bid Invitation 6

Cal eProcure Functionality (slides #9-11)

Cal eProcure user log-in is required for:

- **Bidder Registration:** All bidders can set up their profile in Cal eProcure.
 - Self-service maintenance of bidder profile and notification of new bids posted to CSCR (based on the UNSPSCs the bidder selected)
- **SB/DVBE Certification:** New applicants can apply for certification in Cal eProcure.
 - Certified firms can update or renew their certification information.
- **Note:** FI\$Cal user log-in credentials are not valid in Cal eProcure. FI\$Cal users should be accessing FI\$Cal to perform their tasks.

Cal eProcure user log-in is not required for:

- **SB/DVBE Search:** Find certified SBs and DVBEs.
- **Leveraged Purchase Agreement (LPA) Search:** Search for state LPAs (Statewides, California Multiple Award Schedules, Software Licensing Program, Masters, NASPO ValuePoint, State Price Schedule, etc.).
- **State Contracting and Procurement Registration System (SCPRS) Search:** Search statewide SCPRS data that was entered into FI\$Cal
- **View Bid Opportunities:**
 - **CSCR posting:** CSCR ads will be posted to Cal eProcure.

- Departmental users log into FI\$Cal to create the Event with attached solicitation documents. Once approved, the CSCR ad is posted in Cal eProcure for potential bidders/public to view.
- **CSCR search:** The public will be able to search for new bids on Cal eProcure.

FI\$Cal Procurement (slides #15-20)

- **Plan ahead** for time-sensitive transactions in FI\$Cal
- First-time transactions in FI\$Cal will take time to learn the new fields and functionality. To prepare, use the following resources:
 - FI\$Cal Training Academy (FTA) Courses at: <http://www.fiscal.ca.gov/training-academy/index.html>
 - For FI\$Cal SCPRS and CSCR users only, training is available at: http://fiscal.ca.gov/training-academy/future_release_training.html
 - *“What you don’t use, you lose”*
 - A refresher is needed to help with your first-time transaction
- Refer to applicable User Productivity Kit job aids (UPKs) located on FTA webpage
- Refer to DGS-Procurement Division bulletins
<http://www.dgs.ca.gov/pd/Resources/BroadcastBulletins.aspx>
- Seek out assistance from your department’s super user or Department Liaison
http://www.fiscal.ca.gov/resources/documents/201603_DL_List.pdf
- Refer to FI\$Cal CMO communications sent to Department Liaisons
- User Support Labs (USLs) to help with specific transactions; USLs are not training classes
- Accurate role mapping improves transaction success rate in FI\$Cal:
 - Ensure end users are mapped to the correct BU, especially users who do transactions for multiple BUs
 - Ensure workflow approval routing is correct
 - Statewide Procurement Multi-user Access Request Form (MARF) is required to update end user and approval routing http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/StatewideProcurement_Multi-UserAccessRequestForm_MARF_000.xlsm
 - MARFs must be submitted by your department’s Departmental Authority and Designee (DAD)
 - Allow for processing time within the department and the FSC
- California State Contracts Register (CSCR); Events and Solicitations
 - CSCR Tips-CMO communication sent to DLs on 2/23/2016. The communication included frequently asked CSCR questions, such as:
 - UNSPSC Buyers are encouraged to choose a higher level UNSPSC code (the more trailing zeroes a code has, the higher the level)
 - Solicitation Question and Answers (Q&As)
 - Tracking bidders who downloaded the event
- Bill code requests
 - Requires FSC and DGS involvement and does require time to process

- Ensure the right bill code(s) are assigned to the right BU
- To verify if a bill code exists in DGS' CAN file, go to:
<http://www.dgs.ca.gov/ofs/Forms/FAQ.aspx>. Select the third FAQ and follow the directions posted.
- If it doesn't exist, complete AFS-94 CAN Request form with justification; email to SRFFiscalServices@dgs.ca.gov
- DGS allows only one bill code per appropriation; justification is required to request multiple bill codes per appropriation
- Each AFS-94 requires the department's SCO Account Number/Appropriation Fund Source (obtain from your Accounting Unit)

CSCR Tips - CMO sent to DLs on 2/23/2016 (slide #18)

The following are tips that will benefit departments and the supplier/bidder community when utilizing the California State Contracts Register (CSCR).

1. **Solicitation Package:** Solicitation documents are created and finalized outside of FI\$Cal. Departments will then create an Event in FI\$Cal and attach the solicitation package to the Event for the purpose of posting to CSCR.
2. **Event Name:** When creating an Event in FI\$Cal for the purpose of posting to CSCR, be descriptive in the Event Name to help bidders searching for solicitations in Cal eProcure. The Event Name can also include a department's unique solicitation number if the department maintains its own solicitation ID numbers other than the ones issued by FI\$Cal.
3. **Event ID:** FI\$Cal automatically generates an Event ID. When creating a new Event, departments can enter their own unique solicitation number in the Event Name (and/or Event Description) field. This helps associate the department's unique solicitation number with the FI\$Cal Event ID. This field is searchable by bidders on Cal eProcure and Event buyers in FI\$Cal.
4. **UNSPSC:** United Nations Standard Products and Services Code (UNSPSC) codes are used as a means to connect bidders to CSCR Events. Bidders use UNSPSC codes to establish which CSCR bid notifications they wish to receive from FI\$Cal. The UNSPSC code(s) a buyer identifies in an Event triggers the bid notification to all bidders who have that same UNSPSC code(s) in their bidder profile. To reach a larger bidder pool, buyers are encouraged to choose a higher level UNSPSC code (the more trailing zeros a code has, the higher the level) and/or add multiple lines to the Event listing other applicable UNSPSC codes. (See attached UNSPSC document for more details on the hierarchy.)
5. **Questions and Answers:** Solicitation Questions and Answers (Q&A) are to be received and processed in accordance with State procurement policy. The Q&A functionality that existed in BidSync is not available in FI\$Cal. However, to facilitate the Q&A process, a buyer may attach the final Q&A document to the CSCR Event by creating a new CSCR version. (See training material "[Creating a new CSCR version](#)") FI\$Cal recommends clearly identifying in the solicitation package how bidders should submit questions, the final date and time questions

may be submitted, when the Q&As will be available for bidders to view, and the final posting date of the New Version.

6. **Making CSCR Events Viewable in Cal eProcure:** To ensure CSCR Events are viewable in Cal eProcure, the “Post to CSCR” checkbox in the “Invite Bidders” section should remain checked. Specific invited bidders will have to login to the Cal eProcure to view the Event. If the Event is intended to be viewed by anyone/the public, the “Public Event” checkbox should be checked and anyone can view the bids without logging into the portal.
7. **Event Format and Event Type:** When creating an Event, the department should keep the default values for the Event Format as “Buy” and the Event Type as “RFx.”
8. **Tracking bidders who downloaded a CSCR Event** functionality is not available in FI\$Cal. The System only keeps track of bidders that “Accept the invitation.” (See attached process.)
9. **PDF filename length:** When attaching/uploading a PDF file, the PDF filename is limited to 40 characters. Exceeding this limit generates a system warning/error and prevents the file from being uploaded and viewable when the Event is posted.
10. **Training materials:** Training materials relating to the statewide procurement functionality released in January 2016 are available at: http://www.fiscal.ca.gov/training-academy/future_release_training.html. Wave 2 departments can access procurement training material (for prior releases) by logging into their FI\$Cal Training Academy (FTA) account at: <https://mss.netdimensions.com>.
11. **Electronic Bids** functionality is currently not available in FI\$Cal. Please direct all potential bidders to submit their bids as specified in the Event/Solicitation package.
12. **Bid Factors and Two Envelope Process** functionality is not currently available in FI\$Cal and therefore, the Bid Factors and Two Envelope Process sections should not be completed.

If you have any technical issues related to the CSCR, please contact the fiscalservicecenter@fiscal.ca.gov.

If you have any policy issues related to the CSCR, please contact your department’s DGS Purchasing Authority Specialist at PAMS@dgs.ca.gov.

FI\$Cal Service Center

Financial Information System for California (FI\$Cal)

855-FISCAL0 | 855-347-2250

fiscalservicecenter@fiscal.ca.gov | www.fiscal.ca.gov

Attachment - UNSPSC Document (slide #18)

UNSPSC: A Hierarchical Structure for Custom Analysis

The UNSPSC is a hierarchical classification, having five levels. The levels allow users to search products more precisely (because searches will be confined to logical categories and eliminate irrelevant hits) and it allows managers to perform expenditure analysis on categories that are relevant to the company's situation.

Each level contains a two-character numerical value and a textual description as follows:

XX **Segment**

The logical aggregation of families for analytical purposes

XX **Family**

A commonly recognized group of inter-related commodity categories

XX **Class**

A group of commodities sharing a common use or function

XX **Commodity**

A group of substitutable products or services

XX **Business Function**

The function performed by an organization in support of the commodity

UNSPSC Examples

In the UNSPSC classification, products and services are placed within logical categories so that people can more easily find what they are looking for and evaluate expenditures on commonly grouped items.

For example, the commodity "pen refills" is part of a larger class of products, "Ink and lead refills", which in turn is part of a family of products, "Office supplies," which is itself part of a segment of products, "Office equipment, accessories, and supplies." Each level of the hierarchy has its own unique number.

Hierarchy	Category Number and Name
<i>Segment</i>	44 Office Equipment, Accessories and Supplies
	10 Office Machines and their supplies and accessories
	11 Office and desk accessories
<i>Family</i>	12 Office supplies
	15 Mailing supplies
	16 Office supplies
	17 Writing instruments
	18 Correction media
<i>Class</i>	19 Ink and lead refills
	01 India ink
	02 Lead refills
<i>Commodity</i>	03 Pen refills

"Pen refills" = UNSPSC classification 44-12-19-03.

The hierarchy allows people looking for pen refills to use the higher level terms to narrow their search to the relevant domain that will most likely lead them to the desired item.

Attachment - Viewing Bidders Who Accepted Bid Invitation (slide #18)

Buyers can only see who has accepted a bid invitation after the Event is closed. (Please note that accepting a bid invitation isn't required to bid.) To view this information:

- Navigate to the Event Workbench (Main Menu > Sourcing > Maintain Events > Event Workbench)
- Search Event ID. Click on View Bid History (highlighted below)

Event Workbench

Search Criteria

Business Unit: 77801

Search Results

Event ID	Name	Format	Type	Unit	Status	Solicitation Type	Acquisition Type	Acquisition Sub-Type	Acquisition Method	Acquisition Sub-Method	DOS Billing Code	Find	View All	First 1-6 of 6	Last
0000000072	FAU10-89-02	Buy	RFx	77801	Open		NON-IT Goods		Formal - COMPETITIVE		00100				
0000000087	Self-Contained Breathing Apparatus	Buy	RFx	77801	Open		NON-IT Goods		Formal - COMPETITIVE		00100				
0000000087	Dehydrated Potatoes	Buy	RFx	77801	01/28/2016 02:00 PM		NON-IT Goods		Formal - COMPETITIVE		00100				
0000000011	Lighting Lamps and Ballast	Buy	RFx	77801	02/09/2016 02:00 PM		NON-IT Goods		Formal - COMPETITIVE		00100				
0000000010	Envelopes, Recycled Paper	Buy	RFx	77801	02/05/2016 02:00 PM		NON-IT Goods		Formal - COMPETITIVE		00100				
0000000116	Car Fire Helicopters	Buy	RFx	77801	Open		NON-IT Goods		Formal - COMPETITIVE		00100				

Under Event Participation Activity, click on the actual number to view invitations

Favorites - Main Menu - > Sourcing - > Maintain Events - > Event Workbench

FI\$Cal

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
77801-0000000087	Dehydrated Potatoes	1	2	RFx	01/28/16 2:00PM PST	Posted

Refresh

Event Participation Activity

Total Event Invitations: 6 **Accepted Invitations: 0** Declined Invitations: 0 No Response: 6 Total Bids Received: 0

Return to Event Workbench

https://financials.fiscal.ca.gov/psp/psfd2/EMPLOYEE/ERP/c/AU

BMC Remedy (Search) Employee-facing registry cont... UPK - Wave 2 Courses Event Workbench

Favorites - Main Menu - > Sourcing - > Maintain Events - > Event Workbench

FI\$Cal

Event Bid History

Event ID	Event Name	Round	Version	Event Type	End Date	Status
77801-0000000087	Dehydrated Potatoes	1	2	RFx	01/28/16 2:00PM PST	Posted

Refresh

Event Participation Activity

Total Event Invitations: 6 Accepted Invitations: 0 Declined Invitations: 0 No Response: 6 Total Bids Received: 0

Invited Bidders

Bidder Name	Invite Status	Bid Posted?
ABC VENTURES LLC		
ADOLPH INC		
CB ENTERPRISES		
CHRISTIAN BARTELS ENTERPRISES INC		
SAN JOAQUIN DISTRIBUTORS INC		
TITUS ENTERPRISES INC		

Return to Event Workbench