



FI\$Cal

Financial Information System for California

Purchasing Wave 2 Configuration Workshop

**BUSN217c Review: Binds,
Classes & Libraries**

February 24, 2015

Agenda

- Configuration Workshop Objectives and Approach
- Demonstration of Final Product
- Review Submitted Values from DGS/CALTECH
- Configuration Items for the Workshop – navigation and screenshots
 - Binds
 - Classes
 - Libraries
- Review Department Submitted Values
- Completion/Questions

PO Configuration Workshop

- Configuration Workshop Objectives and Approach
 - Starting Point is DGS/CALTECH values
 - Demonstrate “end product” to gain better understanding of the configuration items
 - Review individual department submissions after seeing the demo and the DGS/CALTECH submissions

Demonstration

- Demo using DGS submitted values

Binds

- Binds
 - Practical Use
 - Navigation/Screenshot
 - Discussion on Configuration Values/Template
- Definition
 - Binds are variable definitions that enable a user to map source transactional values, such as a purchase order transactional contract or contract wizard values, to content within contract clauses, sections, and Microsoft Word templates
 - When the system processes binds during document generation, the value of the record field that is mapped to the transactional bind variable or the response value of a wizard bind variable replaces the bind variable placeholder in the document

Binds

[Favorites](#) > [Main Menu](#) > [Supplier Contracts](#) > [Manage Contract Library](#) > [Binds](#)

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Bind Definition

Bind Variable:	CITY	Where Used
*Description:	<input type="text" value="City"/> 	
Bind Type:	Wizard	
Field Type:	String	
Field Length:	030	

Classes

- Classes
 - Practical Use
 - Navigation/Screenshot
 - Discussion on Configuration Values/Template
- Definition
 - Clause Classes provide a user-defined method of categorizing clauses, particularly for the purposes of clause approvals.
 - Each class contains a description and an optional list of approval types, including a default that enables a user to define how the clauses of that class are to be approved.
 - For example, when a user creates a new clause, the class must be specified. Based on the class selected, the system can supply the appropriate workflow by the approval type defaulted on the class.

Classes

[Favorites](#) > [Main Menu](#) > [Supplier Contracts](#) > [Supplier Contracts Setup](#) > [Classes](#)

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Clause Class

SetID: Class Name:

*Description:

Default

Approval Settings		Personalize Find View All  		First	1-3 of 3	Last
*Approval Type	Description	Default				
<input type="text" value="HIGHRISK"/> 	High Risk Clauses	<input type="checkbox"/>				
<input type="text" value="LOWRISK"/> 	Low Risk Clauses	<input checked="" type="checkbox"/>				
<input type="text" value="MEDRISK"/> 	Medium Risk Clauses	<input type="checkbox"/>				

Libraries

- Libraries
 - Practical Use
 - Navigation/Screenshot
 - Discussion on Configuration Values/Template
- Definition
 - Clause libraries define a broad grouping of contract clauses.
 - To establish a library, enter a library name and description. After the library is established, contract clauses can be assigned to it using the Library field on the Clause Definition page.

Libraries

[Favorites](#) > [Main Menu](#) > [Supplier Contracts](#) > [Supplier Contracts Setup](#) > [Classes](#) > [Libraries](#)

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Library Definition

SetID: SHARE
 Library: AMENDMENT
 Description:

Department Submissions

- Review Department Submissions
 - State Controller's Office (SCO), Department of Toxic Substances Control (DTSC), California Children & Families Commission (CCFC), Victim Compensation and Government Claims Board (VCGCB), Alcoholic Beverage Control (ABC), High Speed Rail (HSR)
 - Department of General Services (DGS), California Department of Technology (CALTECH)

Question and Answer



FI\$Cal Project Information:

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