FI$Cal CSCR - For Buyers

Supplementing FI$Cal Training Academy

Presented by CalPCA

What You Need to Know – CSCR

- CSCR will be hosted under Fi$cal
- **Solicitations = EVENTS**

What You Need to Know

- Create solicitation Events
- Post Event advertisements
- Edit existing Events

Topics Covered Today

1. Create CSCR entry
   - Route for Approval
2. Create new CSCR version

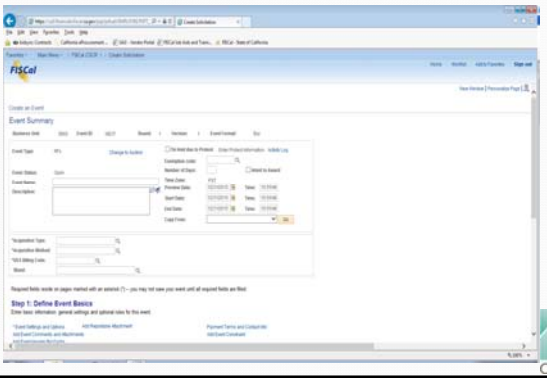
FI$Cal CSCR

Need
- Requisition

Solicitation
- In FI$Cal – now called an Event

Award
- Purchase

Create and Post Events – Overview



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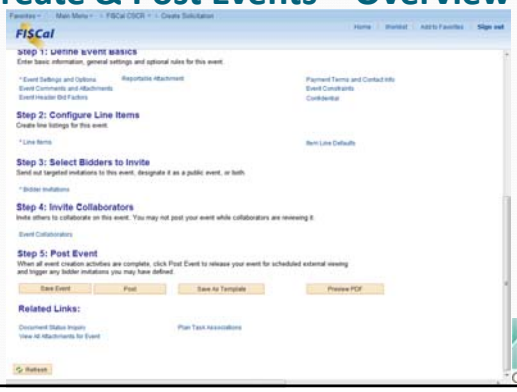
Create & Post Events – Overview



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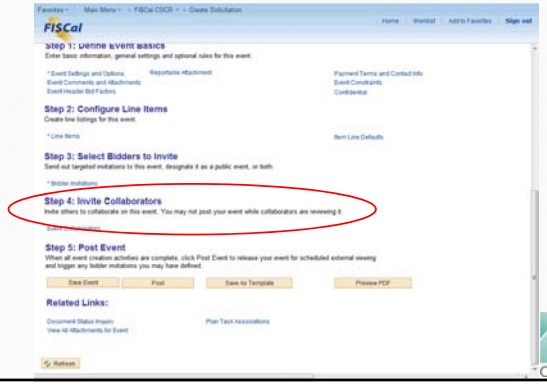
Create & Post Events – Overview



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Posted Solicitation Events

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Creating an Event

- Menu options are dependent on Role
  - Departments map roles within FI$Cal
- Navigate to Create Solicitation Event page
  - *Main Menu -> FI$Cal CSCR -> Create Solicitation*
  - *Main Menu -> Sourcing -> Create event -> Event details*

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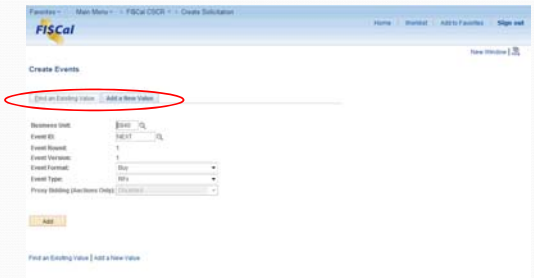
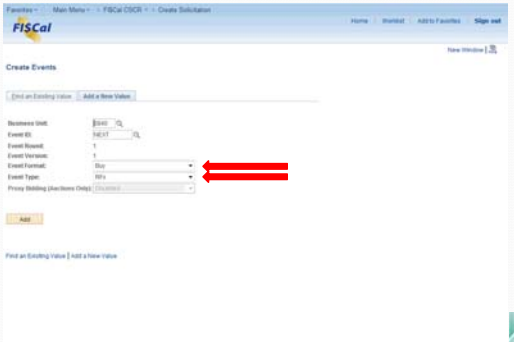
Create an Event - Values



10 Cal-PCA

Create an Event - Format



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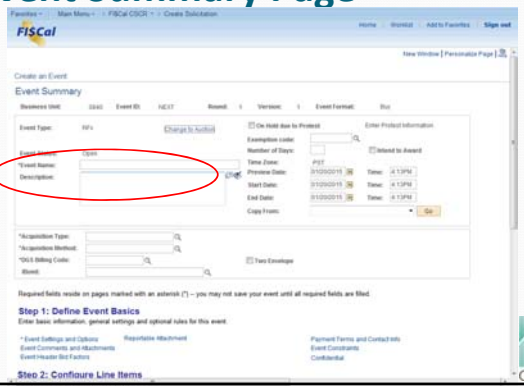
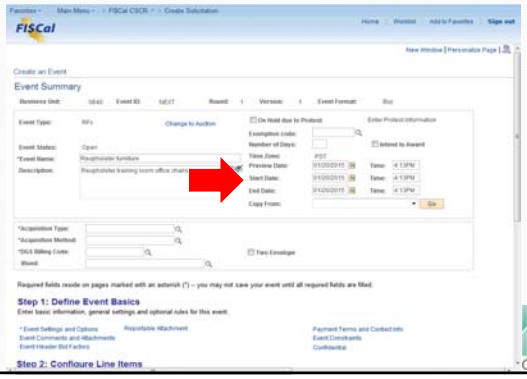
Event Summary Page



12 Cal-PCA

Event – Date options



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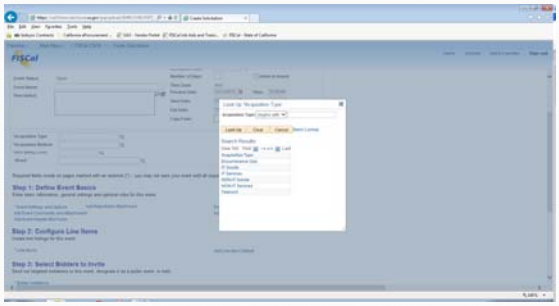
Acquisition Type



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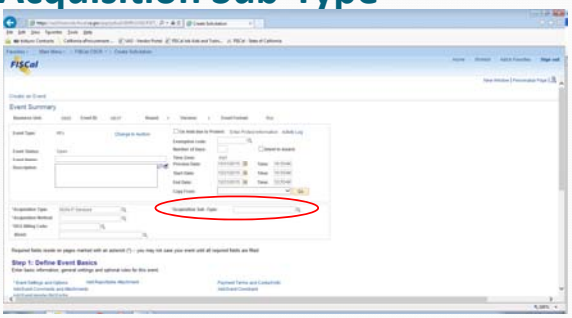
Acquisition Sub-Type



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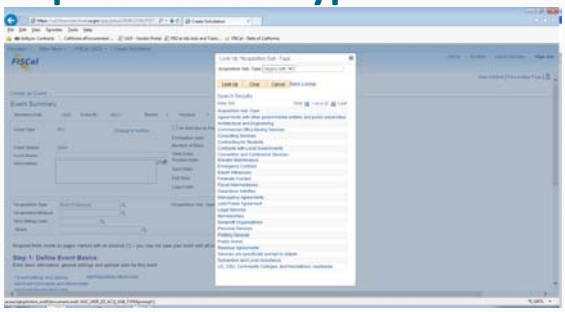

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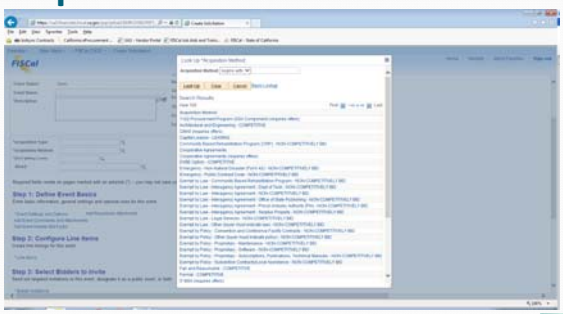
Acquisition Method



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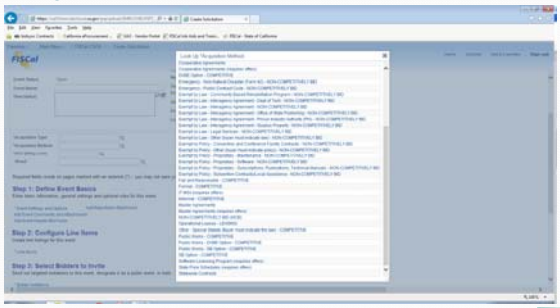

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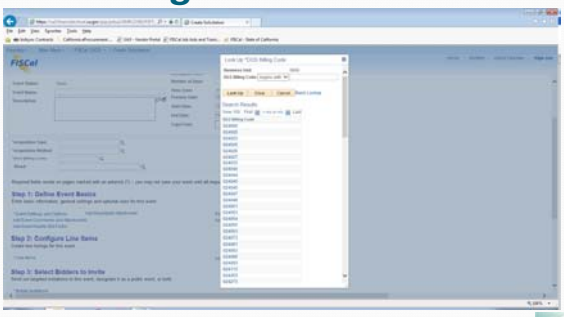
DGS Billing Code



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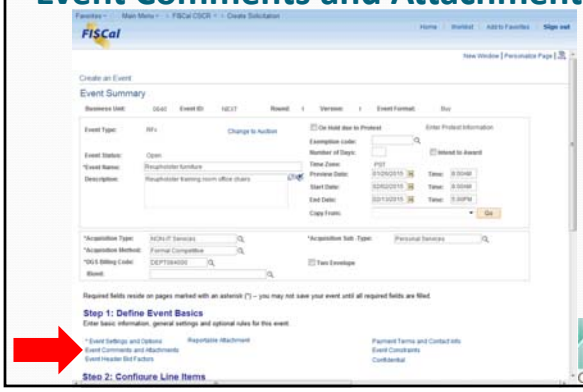
Event Comments and Attachments



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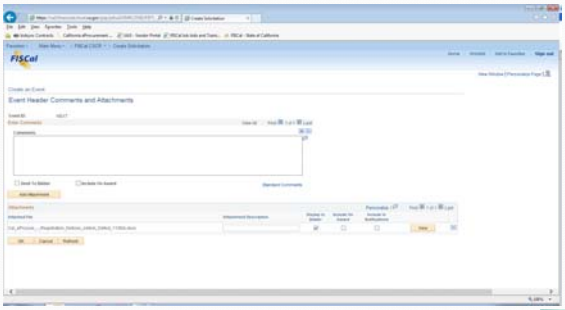
Event Comments and Attachments



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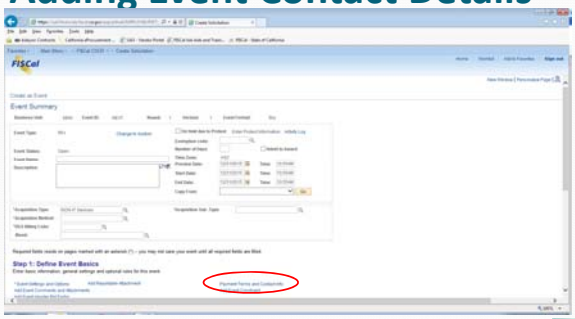
Cal-PCA

Adding Event Contact Details



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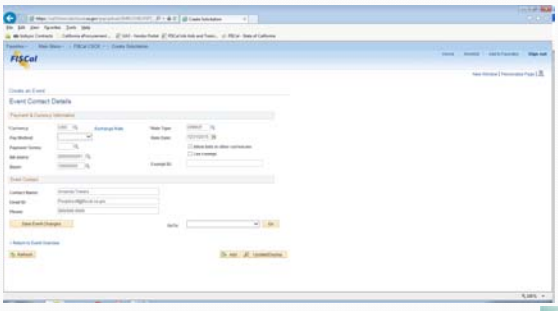
Adding Event Contact Details



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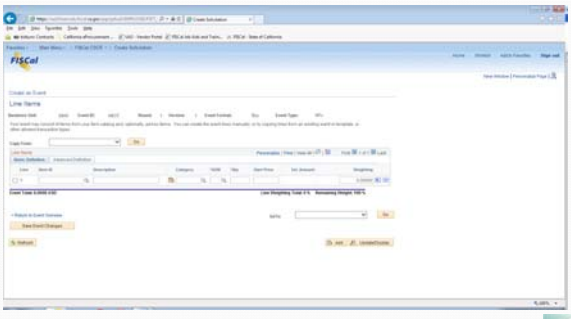
Cal-PCA

Line Items



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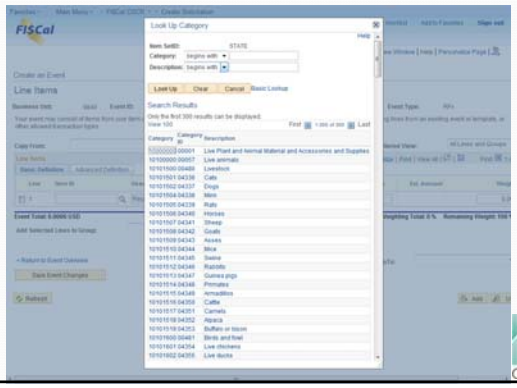
Line Items



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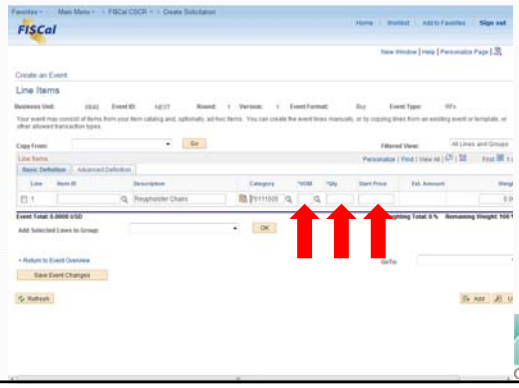
Line Items



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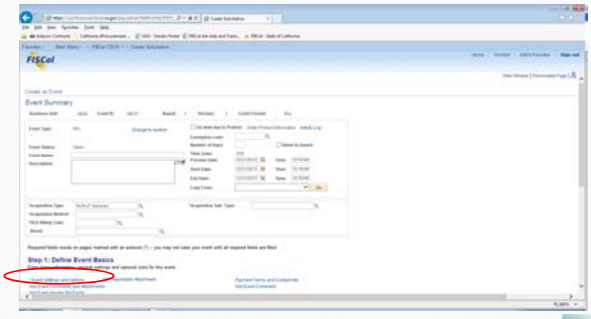
Additional Codes



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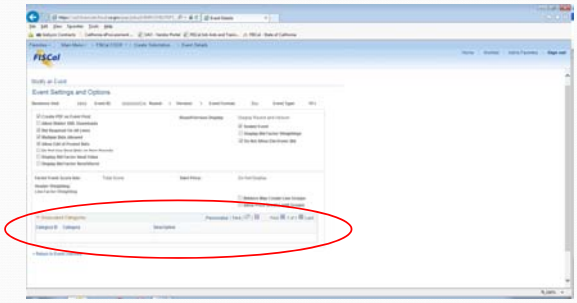
Additional Codes



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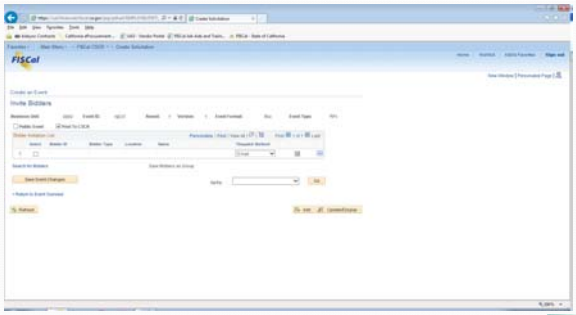
Invite Bidders



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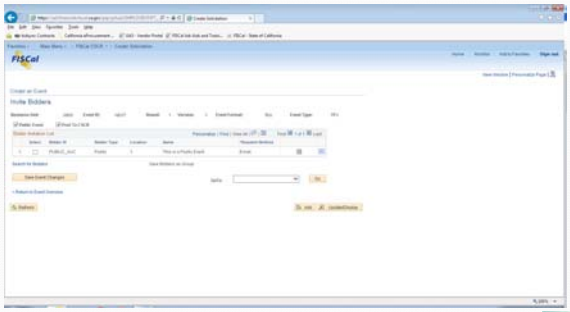
Invite Bidders



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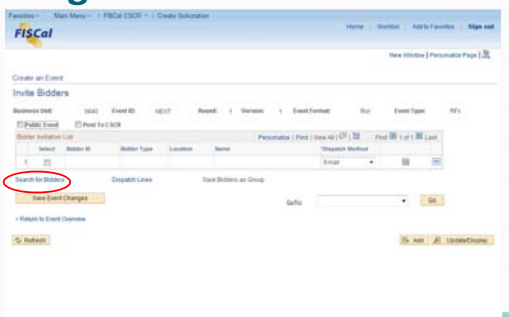
Cal-PCA

Adding Bidders



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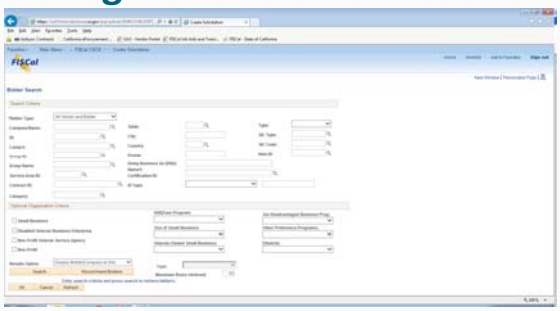
Cal-PCA

Adding Bidders



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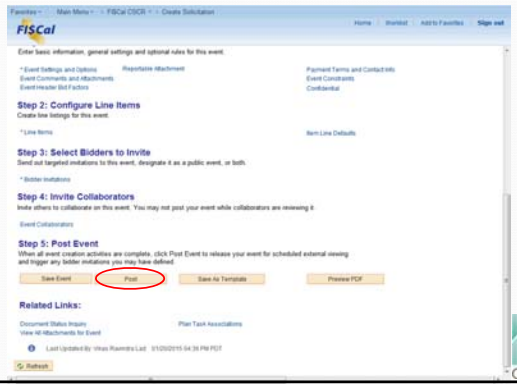
Post Events



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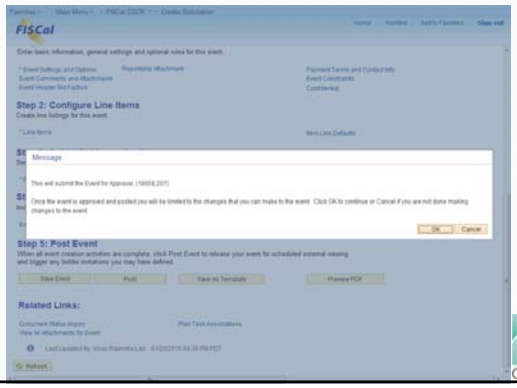
Post Events



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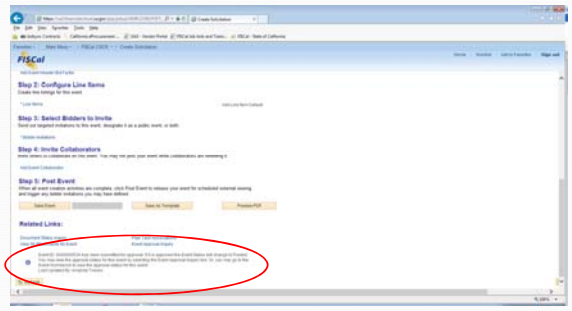
Post Events



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Create an Event – Key Takeaways:

- Solicitation: called an "Event" in FI$Cal CSCR
- Once Event is created, files attached, line items defined, and bidders invited, it can be posted
- No changes can be made to an Event after posting.
  - FI$Cal asks for confirmation before posting.

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CSCR Version

How to edit an existing CSCR Event

CSCR Versions – the new Addendums

Changes to Event details are tracked by Version number

Users can see difference in updated values in the Event.

Once new Version created, any Event detail field can be updated/changed

Event must again be saved & submitted for approval.

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Procedure

Purpose: Demonstrate how to create a new CSCR event version in FIsCal.

Role: Non-FIsCal Department CSCR Processor

Scenario: CSCR event was previously created, but Event details need to be updated. New Version of the Event created and submitted for approval.

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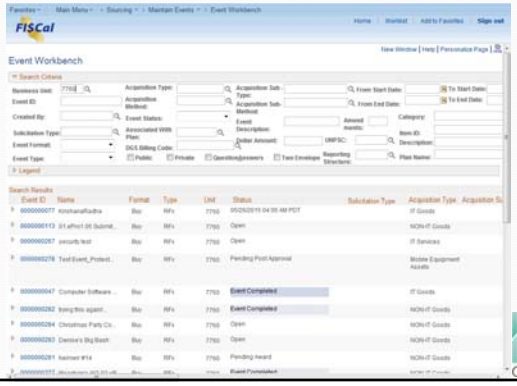
Event Workbench



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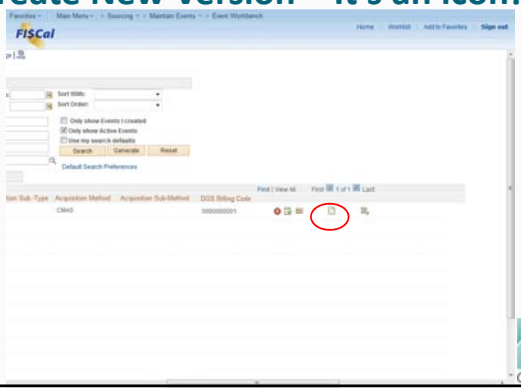
Create New Version – It's an icon!



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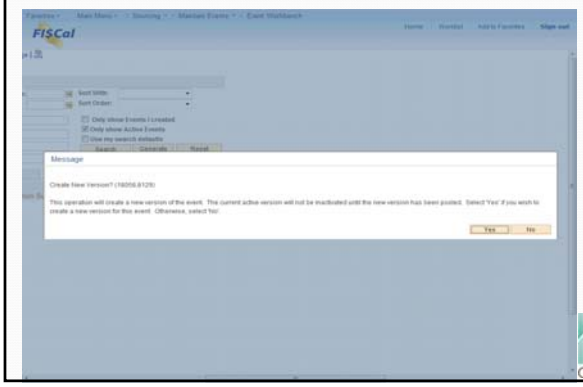
Create New Version – Are You Sure?



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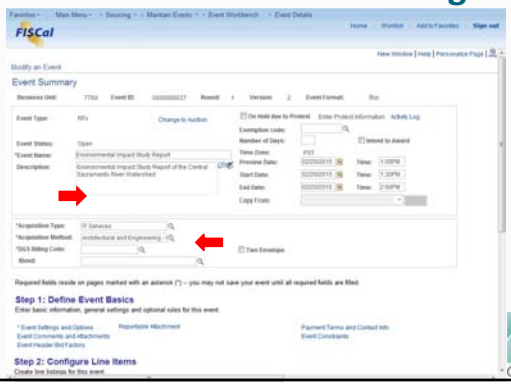
New Version – make the changes



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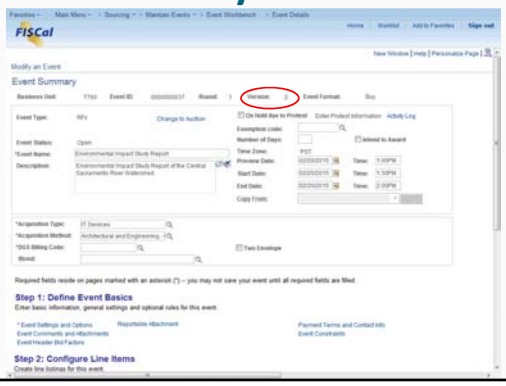
Event Summary



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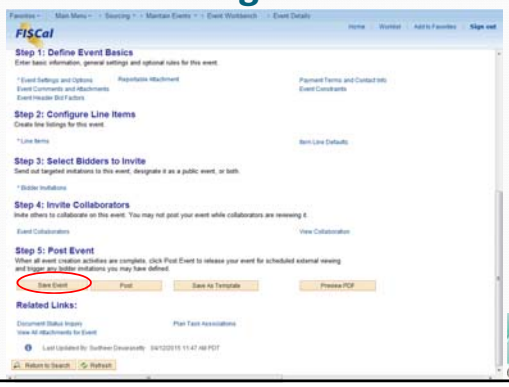
Make the Change



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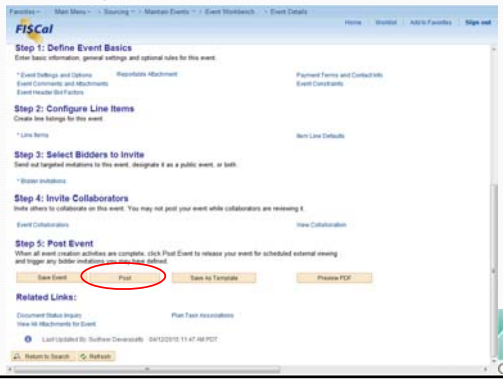
Hit Save, then Post



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Event Versions – Key Takeaways:

- Changes to an approved and posted Event, require that you create a new Version
- Use the Event Workbench to begin the process of creating a new Event Version
- Creating a new Event Version allows user to update details in any field of the Event
- When finished, save and route the new Version for approval

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Cal eProcure

- The public portal of FI$Cal
- Replaces "Bid Sync"
- Vendors need to know about Cal eProcure
  - Do not refer to it as FI$Cal

Vendors use Cal eProcure to view events you create

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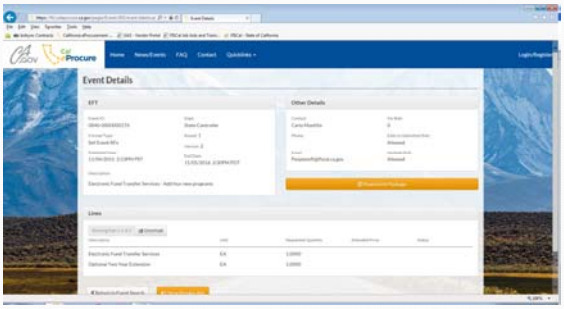
Cal eProcure



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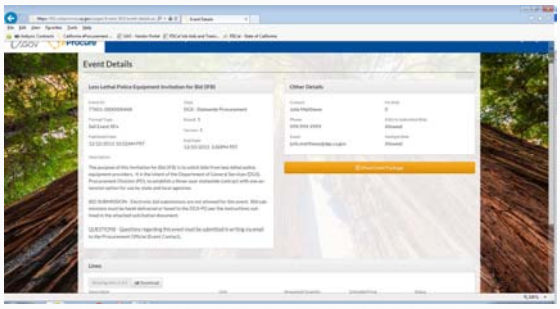
Cal eProcure



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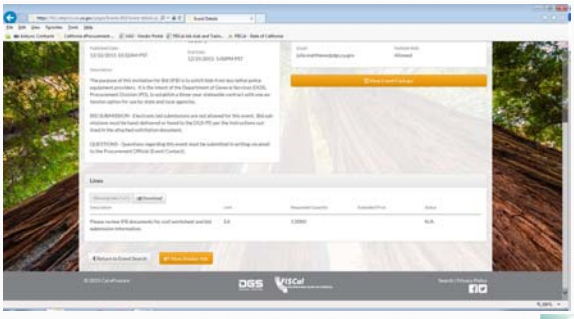

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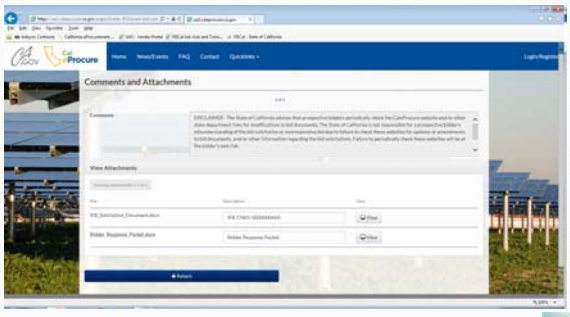
Cal eProcure



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Questions?

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