



How to Record EPP/SABRC in FI\$Cal Supplemental Job Aid 1.0

Date: 10/27/2016

Target Audience: Department Buyer, Department Advanced Buyer, and Department PO Processor

Purpose: The purpose of this supplemental job aid is provides basic instructions on how to record EPP and SABRC in FI\$Cal.

Introduction:

In order to designate a purchase as Environmentally Preferable (EPP), the purchase must fulfill one or more of the following criteria:

1. **Acquired through an EPP Item**
2. Meet a DGS Purchasing Standard
3. Include Third-Party Environmental Certification(s)
4. Include the availability of a Take-Back program
5. Be State Agency Buy Recycled Campaign (SABRC) compliant
6. Get recorded in FI\$Cal as EPP

Purchases that meet one or more of the listed criteria are considered EPP and must be reported within FI\$Cal.

Specific EPP terms are used within FI\$Cal. For definitions of the EPP Terms used, see *Buying Green: EPP Terms*.

The EPP FI\$Cal Job Aids are a comprehensive “how-to” series that provides detailed instructions on how to buy green. Visit the Supplemental Job Aids & Training Tips FI\$Cal link to access the complete Buying Green Job Aids.

What is EPP in FI\$CAL:

The EPP Program incorporates EPP into FI\$CAL to promote and encourage green purchasing. To assist state departments with the reporting of products that meet EPP criteria, the Department of General Services Environmentally Preferable Purchasing (EPP) Program has established this document.

When to Record EPP in FI\$Cal:

Departments shall record EPP purchases in FI\$Cal. By recording EPP attributes within FI\$CAL, in accordance with the Buying Green Procedures, departments will be able to monitor the green purchasing progress through FI\$CAL reports.

How to Record EPP in FI\$Cal:

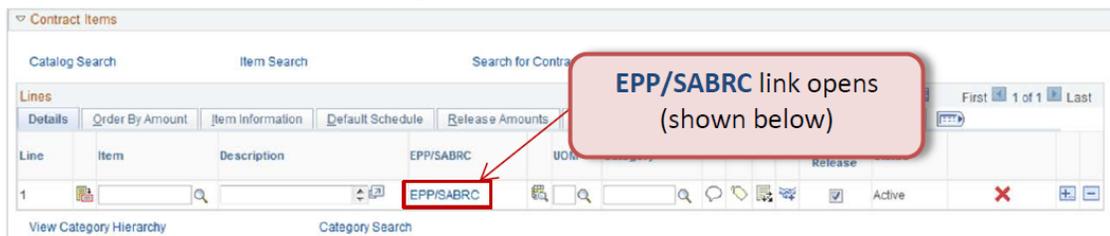
Record a Purchase via an Item

The simplest way to buy green and report green purchases is to purchase through an EPP Item. If purchasing EPP Items, no further action in FI\$Cal is required. As applicable, EPP Items will incorporate third-party environmental certifications, take-back, and/or SABRC information into your FI\$Cal record.

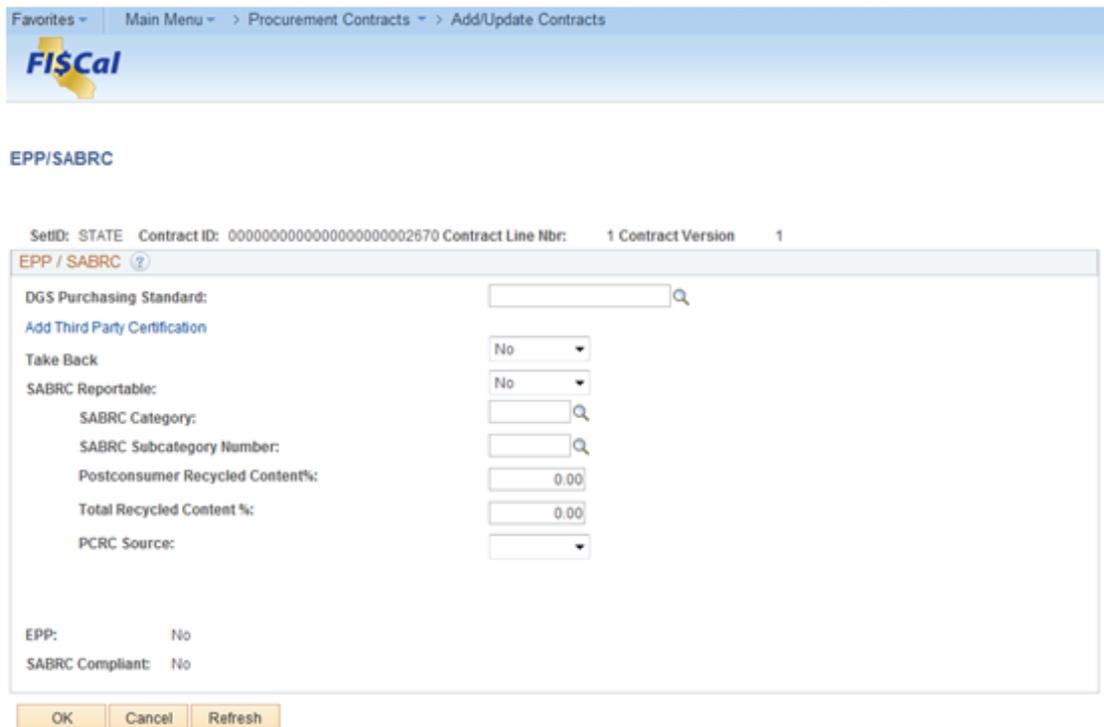
Record a Purchase Line with EPP Criteria

For all EPP and SABRC reportable purchases, other than those being purchased through an EPP Item, apply the following steps to report your Environmentally Preferable Purchases in FI\$Cal.

1. Click on link to open EPP/SABRC page.



2. On the EPP/SABRC page, enter the following information as applicable:



Favorites - Main Menu - > Procurement Contracts - > Add/Update Contracts
FI\$Cal
EPP/SABRC
 SetID: STATE Contract ID: 00000000000000000000000002670 Contract Line Nbr: 1 Contract Version 1
EPP / SABRC ⓘ
 DGS Purchasing Standard:
 Add Third Party Certification
 Take Back: No ▾
 SABRC Reportable: No ▾
 SABRC Category:
 SABRC Subcategory Number:
 Postconsumer Recycled Content%:
 Total Recycled Content %:
 PCRC Source:
 EPP: No
 SABRC Compliant: No

- 3 **DGS Purchasing Standard:** Use lookup icon (i.e., magnifying glass) to select applicable DGS Purchasing Standard. If DGS Purchasing Standard does not apply, leave blank. See *FI\$Cal Job Aid: How to Apply DGS Purchasing Standards*.

Favorites ▾ Main Menu ▾ > Procurement Contracts ▾ > Add/Update Contracts

FI\$Cal

EPP/SABRC

SetID: STATE Contract ID: 000000000000000000000000002670 Contract Line Nbr: 1 Contract Version 1

EPP / SABRC ?

DGS Purchasing Standard:	<input type="text"/>	
Add Third Party Certification		
Take Back	No ▾	
SABRC Reportable:	No ▾	
SABRC Category:	<input type="text"/>	
SABRC Subcategory Number:	<input type="text"/>	
Postconsumer Recycled Content%:	0.00	
Total Recycled Content %:	0.00	
PCRC Source:	<input type="text"/>	

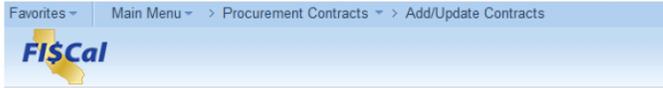
EPP: No
SABRC Compliant: No

OK Cancel Refresh

Click to add DGS Purchasing Standard



- Add Third-Party Certification(s):** Click link to open Third-Party (Environmental) Certification page, and select up to three Third-Party (Environmental) Certifications. See *FI\$Cal Job Aid: How to Apply a Third-Party Environmental Certification*.



Third Party Certification

SetID: STATE Contract ID: NEXT
Version: 1 Line Nbr: 1

Number	Third Party Certification	Title
1		

OK Cancel Refresh

Use lookup to select Third Party Certification

Click (+) to add additional certifications



Third Party Certification

SetID: STATE Contract ID: NEXT
Version: 1 Line Nbr: 1

Number	Third Party Certification	Title
1	EPEAT	EPEAT
2	ENERGY STAR®	ENERGY STAR® Program Requirements Product Specification for Computer Servers

OK Cancel Refresh

Click "OK" to return to EPP/SABRC page.

- Take-Back** – Select "Yes" from drop-down if Contractor/Supplier/Vendor provides a Take Back option for this item. See *FI\$Cal Job Aid: How to Incorporate Take-Back*.

EPP/SABRC

SetID: STATE Contract ID: 000000000000000000002670 Contract Line Nbr: 1 Contract Versi

EPP / SABRC (?)

DGS Purchasing Standard: DGS-441200-A

Edit Third Party Certification

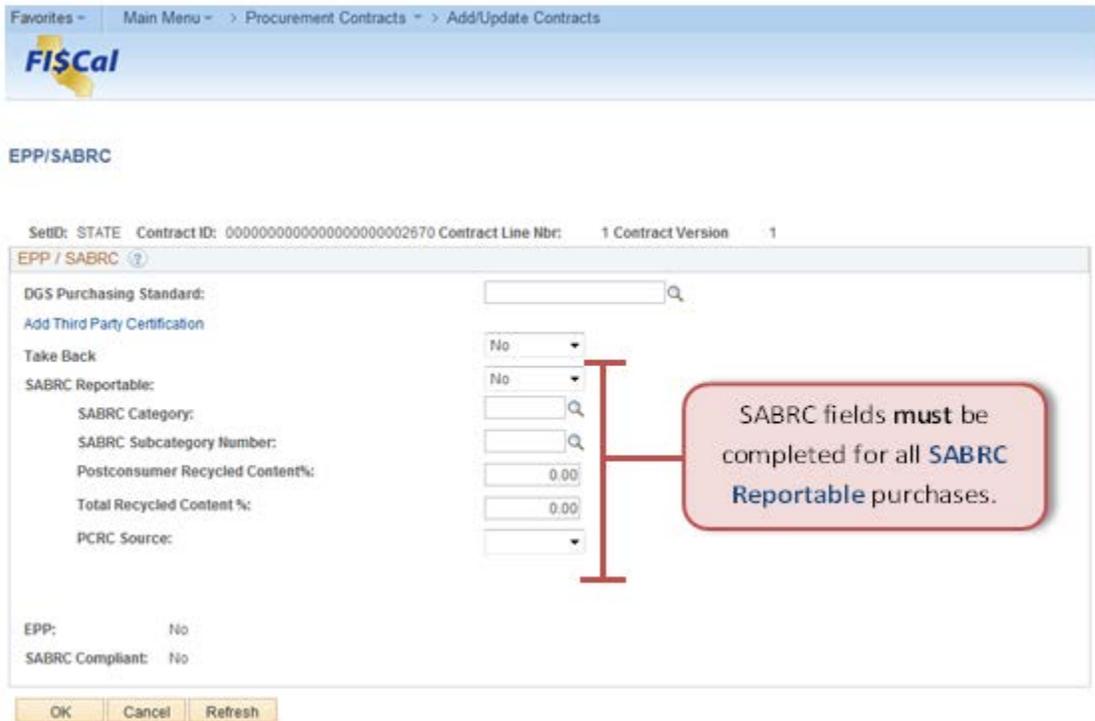
Take Back: Yes

SABRC Reportable: Yes

SABRC Category: 1

SABRC Subcategory Number: 1A

Take-Back Yes/No field



6. **SABRC Reportable** – Select “Yes” from drop-down if item falls within one or more of the SABRC reportable categories, regardless of whether the item meets the minimum recycled content. See *FI\$Cal Job Aid: How to Apply SABRC*

7. **SABRC Category** – If item is SABRC reportable, use lookup icon (i.e., magnifying glass) to select applicable SABRC Category (e.g. “6 – Plastic Products”).

8. **SABRC Subcategory Number** – If item is SABRC reportable, use lookup icon (i.e., magnifying glass) to select applicable SABRC Subcategory Number (e.g. “6C – Carpet”).

9. **Postconsumer Recycled Content % (PCRC)** – Enter PCRC percentage for item in number format (i.e. “5” = 5% PCRC).

10. **Total Recycled Content % (TRC)** – Enter TRC percentage for item in number format (i.e. “10” = 10% TRC). TRC is the sum of PCRC and any additional preconsumer recycled content, thus TRC must be equal to or greater than PCRC.

11. **PCRC Source** – Select source of PCRC information from drop-down (Product Label, Product Specifications, Catalog, OEM Website, Vendor, Other).

12. Click “OK” button to return to main Contract page.

13. Click “Save” button on the bottom of Contract page to save changes.

EPP/SABRC information is tracked at the line item level. Repeat step for each line item as applicable.

EPP/SABRC Page (completed view):

Favorites ▾ Main Menu ▾ > Procurement Contracts ▾ > Add/Update Contracts


EPP/SABRC

SetID: STATE Contract ID: 000000000000000000000000002670 Contract Line Nbr: 1 Contract Version 1

EPP / SABRC ?

DGS Purchasing Standard: DGS-441200-A Paper, Product Office Supplies

Edit Third Party Certification

Take Back Yes ▾

SABRC Reportable: Yes ▾

SABRC Category: 1 Paper Products (PP, 30% Min. PC)

SABRC Subcategory Number: 1A Paper Products (PP, 30% Min. PC)

Postconsumer Recycled Content%: 10.00

Total Recycled Content %: 30.00

PCRC Source: Catalog ▾

EPP: Yes

SABRC Compliant: No

OK Cancel Refresh

These fields automatically update based on information entered on the EPP/SABRC page.

Click "OK" to return to Main Contract page.

EPP/SABRC information is tracked at the line item level. Repeat step for each line item as applicable.



One state. One system.

References & Resources:

Buying Green Guide DGS publishes a best practices manual – the Buying Green Guide, online at www.dgs.ca.gov/buyinggreen. The guide provides state buyers and suppliers with a single source of up-to-date EPP Contracts, DGS Purchasing Standards, bid specifications, and buying tips. It also provides access to laws, regulations and standards that shape procurements and provides transparency to the work DGS does.

The **EPP FI\$Cal Job Aids** are a comprehensive “how-to” series that provides detailed instructions on how to buy green and how to record those purchases in FI\$Cal. Visit the Buying Green in FI\$Cal page at

[http://www.dgs.ca.gov/buyinggreen/GeneralInfo/BuyingGreeninFI\\$Cal.aspx](http://www.dgs.ca.gov/buyinggreen/GeneralInfo/BuyingGreeninFI$Cal.aspx) to access the complete EPP FI\$Cal Job Aids:

1. How to Purchase Through an EPP Item
2. How to Apply DGS Purchasing Standards
3. How to Apply Third-Party Environmental Certifications
4. How to Include Take-Back
5. How to Apply State Agency Buy Recycled Campaign (SABRC)
6. How to Record EPP/SABRC in FI\$Cal

For additional references & resources, visit the Buying Green Guide, online at www.dgs.ca.gov/buyinggreen.

Contact the Environmentally Preferable Purchasing Program with Buying Green questions by emailing buygreen@dgs.ca.gov