



## III CALSTARS Client Services

The CALSTARS staff provides extensive support, guidance, and training to our clients during implementation of the system. After implementation, ongoing, onsite support and consultation are provided as needed. Also, routine support to all clients is provided through a telephone HOTLINE, regularly scheduled classroom training sessions, and maintenance of the Procedures Manual and other documentation. Services are available if an agency requires special system processing sessions. This chapter describes the available CALSTARS staff services, special processing services, CALSTARS assistance on the Internet, communications tools, training and special sessions.

### CLIENT SUPPORT UNIT

#### CALSTARS Hotline Support

The HOTLINE assists CALSTARS clients with clarification of News items, CALSTARS Operations Memos (COMs), and to answer brief questions. A CALSTARS analyst provides HOTLINE telephone assistance each working day from 8:30 AM to 12 Noon and 1:00 PM to 4:30 PM. The HOTLINE can also be accessed via e-mail. The HOTLINE is staffed to answer Year-end questions on Saturdays from 8:00 AM to 1:00 PM, from early July to mid-August.

Normally, HOTLINE questions are answered immediately. If the HOTLINE analyst is unavailable, leave a message. The HOTLINE analyst will respond as quickly as possible. Our policy is to return all calls or e-mails the same day. If a question requires extensive research, an analyst will be assigned to complete work on that task.

Agencies that are assigned an analyst will use the HOTLINE as a second source of information when the assigned analyst is not available. For all other agencies the HOTLINE is the primary resource for CALSTARS analytical assistance.

Examples of HOTLINE topics are:

- ✧ Accounting related questions
- ✧ Data errors and how to resolve them
- ✧ Standard reports and how to use them
- ✧ Table maintenance questions
- ✧ Transaction code questions
- ✧ Clarification of COMs, News Items and CALSTARS Procedures
- ✧ Questions about the special reports request process
- ✧ Questions about CALSTARS in general.

Agencies may contact the HOTLINE at (916) 327-0100 or via e-mail at [hotline@dof.ca.gov](mailto:hotline@dof.ca.gov).

## General Assistance

The Client Support Unit provides support for clients in need of general assistance, usually for a short duration. Requests for temporary support may occur for a variety of reasons, e.g., when an agency has an unusual amount of turnover and a number of employees are new. Under these circumstances, the Client Support Unit may offer short-term assistance.

Examples of types of general assistance support are:

- ✦ Assistance to incorporate and use CALSTARS enhancements and new capabilities.
- ✦ Assistance in bringing reconciliation's current.
- ✦ Consultation in accounting structures, procedures and activities.
- ✦ Informal training for new staff.

To request general assistance, call (916) 445-0211, Extension 2811, and ask for the Client Support Unit Manager or e-mail at [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov).

## CALSTARS Training Classes

CALSTARS system training is offered at no cost and consists of:

- ✦ Initial training for agencies new to CALSTARS.
- ✦ Year-end training for all CALSTARS agencies.
- ✦ Ongoing training for new or newly promoted employees in existing agencies or for employees coming from a non-CALSTARS agency.

Each August, a COM is issued containing information about class curriculum, registration procedures and classes scheduled for the current fiscal year.

Also, information on CALSTARS training calendars, registration instructions, and class descriptions is now available electronically on the Internet at <http://www.dof.ca.gov/accounting/calstars/training/>

## Monarch Software Support

Monarch for Windows is a PC based software program from the Datawatch Corporation. Monarch is a data access and analysis tool that can be used to read, query, filter, sort and summarize extracted data from CALSTARS Standard Reports and send that data to agency's spreadsheets, databases or word processors for further analysis and agency use. CALSTARS provides Monarch training for agencies on an ongoing basis.

For more information about Monarch training, please call (916) 445-0211 Extension 2812.

**SYSTEM SUPPORT AND INFORMATION COORDINATION UNIT****System Support**

CALSTARS services are provided in the following areas:

**Special Processing Requests**

Occasionally, an agency requires CALSTARS assistance to process Labor Distribution or Cost Allocation for a prior period. When the need for special processing is identified, the agency should contact the CALSTARS System Support Unit. CALSTARS staff will discuss the situation with agency staff to determine the need for special processing. If special processing is needed, the agency will submit a written request for the special processing. As soon as the request is received, CALSTARS staff will plan and schedule the special processing. Special processing due to failure to run Labor Distribution or Cost Allocation for a month will be done during the agency's run of the subsystems in the next month.

For further information regarding special processing, please call (916) 445-0211, Extension 2811, and ask for the System Support Unit Manager or e-mail [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov).

**Report Routing**

The System Support Unit maintains the Report Routing and ROPES Tables. These Tables contain the default level-of-detail and output media destinations (including datasets) for each CALSTARS Standard and System-Generated Report. On a daily basis, agencies may override the Standard Reports default settings through Command **G.3**. Agencies may also request to have their default settings changed for Standard and System-Generated Reports.

For further information regarding report routing, please call (916) 445-0211, Extension 2811, and ask for the System Support Unit Manager or e-mail [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov).

**Special Report Requests**

Normally, agencies obtain all needed reports through the standard report request process and retain these reports to meet audit requirements and other future needs. However, prior period reports not ordered or lost can be obtained by submitting a Special Report Request form (CALSTARS 92) to the CALSTARS System Support Unit. Special Report Requests are done after all other normal day-shift production work, on a time availability basis.

The special report request form (CALSTARS 92) is available on the internet at <http://www.dof.ca.gov/accounting/calstars/forms/>. The form is also available in the CALSTARS Procedures Manual Volume 6, Chapter II, which may be accessed at [www.dof.ca.gov/html/calstars/cpm.htm](http://www.dof.ca.gov/html/calstars/cpm.htm).

For additional information concerning special report requests, contact the HOTLINE at (916) 327-0100 or e-mail [HOTLINE@dof.ca.gov](mailto:HOTLINE@dof.ca.gov).

**External Transactions Processing**

This option may be used by agencies to submit files of data (table transactions and/or financial transactions). A staff member of the System Support Unit will be assigned to assist you in this process.

For further information regarding External Transactions processing, please call (916) 445-0211, Extension 2811, and ask for the System Support Unit Manager or e-mail [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov).

**System Enhancements**

Many system enhancements are implemented as a result of client suggestions. The CALSTARS Suggestion Form (CALSTARS 106) may be used to submit suggestions for improvements. The mailing address, fax number and e-mail address for submitting suggestions are included on the form. The form may be completed online from the CALSTARS web page at <http://www.dof.ca.gov/accounting/calstars/forms/>. Receipt of suggestions will be acknowledged via e-mail, if one is provided. Suggestions that relate to current system changes are evaluated as they are received. Otherwise, CALSTARS Management will review suggestions quarterly for possible future implementation. The CALSTARS 106 is shown in Exhibit III-1.

**Information Coordination****CALSTARS News**

We recommend agency personnel read the CALSTARS News online daily. Agencies may request that items be placed on the CALSTARS News. Only items of interest to CALSTARS agencies will be considered. Due to space limitations, news items may be shortened.

For more information about the CALSTARS News, please call (916) 445-0211, Extension 2811, and ask for the CALSTARS Information Coordinator or e-mail [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov). To announce job opportunities on the CALSTARS News, please e-mail your announcement to [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov).

**CALSTARS Manuals and CALSTARS Operations Memos (COMs)**

The CALSTARS Procedures Manual (CPM) provides guidance for the use of CALSTARS. It consists of seven volumes that are available on the Internet at [www.dof.ca.gov/html/calstars/cpm.htm](http://www.dof.ca.gov/html/calstars/cpm.htm). The CPM is updated through Transmittal Letters (TLs), which are also available on the Internet at [http://www.dof.ca.gov/accounting/calstars/transmittal\\_letters/](http://www.dof.ca.gov/accounting/calstars/transmittal_letters/).

CALSTARS Operations Memos (COMs) are also used to communicate guidelines and other useful information to agencies about CALSTARS. The information may or may not require action. Some of the COMs are added to the CPM through TLs at a later date. COMs are available on the Internet at [http://www.dof.ca.gov/accounting/calstars/procedures/operations\\_memos/](http://www.dof.ca.gov/accounting/calstars/procedures/operations_memos/).

EXHIBIT III-1

<b>STATE OF CALIFORNIA</b> <b>CALSTARS SUGGESTION FORM</b> CALSTARS106 (REV 9/07)		<b>To:</b> CALSTARS System Support Unit Department of Finance (IMS: A-15) 915 - L Street, 7 <sup>th</sup> Floor Sacramento, CA 95814 FAX: (916) 323-4049 E-mail: calstars@dof.ca.gov		<b>(for CALSTARS use only)</b> <b>Suggestion</b> <b>Number:</b> _____  <b>E-mail acknowledgement</b> <b>sent – initials:</b> _____	
<p><i>Please complete this form for suggestions to improve CALSTARS. Receipt of suggestions will be acknowledged via e-mail, if one is provided. Please use one form for each subject; e.g.: reports (each report). Suggestions will be reviewed quarterly by CALSTARS Management for possible future implementation. However, direct feedback will not be provided as to the status or potential for implementation of each suggestion. If you have questions, please call (916) 445-0211, extension 2811 and ask for the System Support Unit Manager or e-mail at calstars@dof.ca.gov.</i></p>					
NAME			DATE	TELEPHONE NUMBER	EXTENSION
				( ) -	
ORG CODE	DEPARTMENT		E-MAIL ADDRESS		
<b>AREA OF SUGGESTION</b>					
TABLES	YEAR-END	LABOR	PROCESSING	REPORTS	OTHER (explain)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DESCRIPTION OF CHANGE					
BENEFITS					

### **CALSTARS On The Internet**

CALSTARS system documentation and other fiscal related information are maintained electronically on the Internet. The CALSTARS web page can be accessed at <http://www.dof.ca.gov/html/calstars/index.html> and includes the following items:

- ✧ CALSTARS Development Plan
- ✧ CALSTARS Operations Memos
- ✧ CALSTARS Procedures Manual
- ✧ CALSTARS Training Schedule
- ✧ CALSTARS forms for transaction coding, training registration, suggestions, and statewide table updates (some forms may be completed online and submitted electronically.)
- ✧ General information on system capabilities, services and support (including training aids), agencies and contacts.

Links are also provided from the CALSTARS home page to other fiscal related web pages containing:

- ✧ Uniform Codes Manual
- ✧ Manual of State Funds
- ✧ Governor's Budget
- ✧ Budget Letters
- ✧ Budget Forms
- ✧ Budget Instruction Management Memos
- ✧ Management Memos
- ✧ Finance Glossary
- ✧ Office of State Audits and Evaluations
- ✧ State Administrative Manual
- ✧ Constitution/Codes/Statutes
- ✧ Catalog of Federal Domestic Assistance.

## **TECHNOLOGY SUPPORT UNIT**

### **CALSTARS Operations**

Call (916) 323-7541 for:

- ✧ Report inquiries - missing, re-requesting, burping, microfiche, uploads.
- ✧ ROPES printer operations - starting, transferring, zapping reports.
- ✧ Hardware failure (printers, terminals, etc.) - line or communication problems, screen-print problems, no response or slow response from a terminal or "SESSION NOT BOUND" during logon.

## CALSTARS Security

Each CALSTARS agency must have an Agency Security Officer designated by the manager of an accounting office or higher organizational level. These officers are responsible for establishing the CALSTARS users and the associated security settings for their agency. To designate an individual as the Agency Security Officer, the agency must complete a CALSTARS Agency Security Officer Appointment Form (CALSTARS 98) and a CALSTARS Security Form (CALSTARS 95), and fax them to the address on the bottom of the forms.

The CALSTARS EDP Security Supervisor will process the forms and setup the CALSTARS Agency Security Officer. The CALSTARS Agency Security Officer can then directly perform Adds, Changes, Deletes, and Resets on their agency's CALSTARS Security Table.

If there are any questions on the establishment of a CALSTARS Agency Security Officer, call the CALSTARS EDP Security Officer at (916) 323-7541 or e-mail [prodcntl@dof.ca.gov](mailto:prodcntl@dof.ca.gov).

## CALSTARS Hardware/Software Support

The following hardware/software support services are provided:

- ✦ Full implementation support for new CALSTARS agencies.
- ✦ Relocating, ordering and installing CALSTARS equipment.
- ✦ Assisting agencies to determine whether to purchase or lease new equipment when the Master Rental Agreement contract for the existing equipment expires.
- ✦ **Effective April 1, 2011**, customers will use their procurement delegation approval from DGS for procuring their mainframe local printers. It is recommended that customers submit a service request with OTech prior to purchasing a new printer to ensure the technical specifications of the printer will provide the necessary connectivity to OTech processing services. The service request should contain a completed "**Customer Printer Requirements Questionnaire**" to communicate the customer print requirements. OTech staff will review the Requirements document, make recommendations, and provide technical specifications for you to purchase an acceptable printer.
- ✦ For assistance with future purchases of mainframe printer and/or maintenance purchases, customers are advised to contact vendors such as Visara International (Contractor for the previous OTech MRA) or small businesses.
- ✦ CALSTARS will continue to submit a service request to OTech to request mainframe print definitions.
- ✦ Assisting agencies to consolidate SCO and CALSTARS equipment to share terminals and communication lines.
- ✦ Technical consulting assistance for alternative hardware/software, i.e., IBM compatible PCs, Apple/Mac PCs, etc.

For further information regarding hardware/software support services, please call (916) 323-7541, and ask for the Production Control Unit Supervisor or e-mail [prodcntl@dof.ca.gov](mailto:prodcntl@dof.ca.gov).