

How to Run the Consolidated Annual Report Forms in FI\$Cal Job Aid

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Target Audience: Department SCPRS Processor, P-Card Reconciler, Central PO Reporter, Department PO reporter, DGS PO Reporter, DOF PO Reporter

Purpose: A Run Control Page has been developed in the FI\$Cal system to generate the Consolidated Annual Report Forms. The purpose of this job aid is to provide detailed instructions for the following:

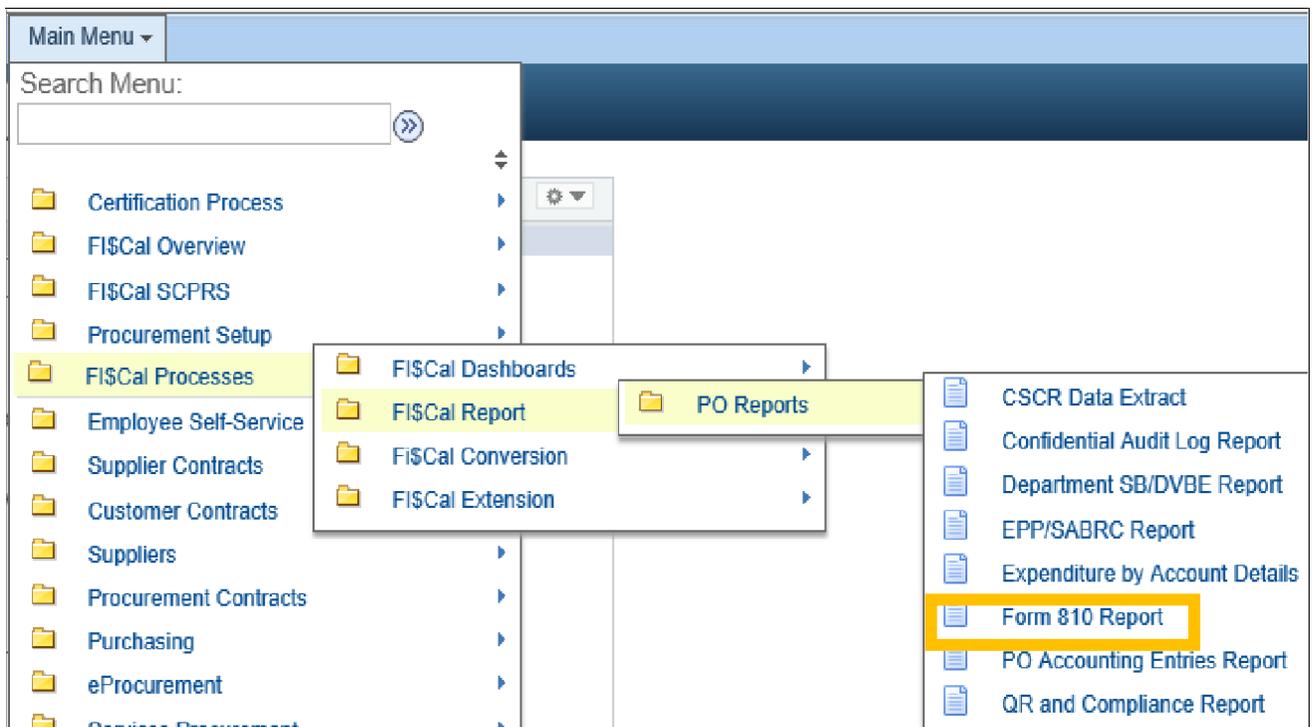
- Access to the Run Control Page
- Run the Consolidated Annual Report Forms
- Access to the Data Validation Query

How to run a standard Consolidated Annual Report form:

Access FI\$Cal login page here: <https://fiscal.ca.gov/>

Step 1: Use the following navigation path to access the Run Control Page:

Main menu > FI\$Cal Processes > FI\$Cal Report > PO Report > Form 810 Report



Note – Use the same navigation for all 5 Forms.

Step 2: On the **OSDS Form 810 Report** page click on the **Add a New Value** button.

OSDS Form 810 Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Search by: Run Control ID begins with

Case Sensitive

[Search](#) [Advanced Search](#)

Step 3: Create and enter a **Run Control ID** with no spaces then click on the **Add** button.

OSDS Form 810 Report

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID

 [Add](#)

Step 4: After clicking on the **Add** button the **Form 810 Reports** page will appear.

Form 810 Reports

Run Control ID OSDS_Test Report Manager Process Monitor Run

Business Unit

Reporting Period

*CAR Fiscal Year

Fiscal Year to Date

Custom Date Range From Date To Date

(Choose From and To Date within the selected CAR Fiscal Year)

Type of Report

Individual Business Unit

Exclude Mission Tasks

SelectAll De-SelectAll

Statewide Incidents		
Select	Statewide Incident ID	Statewide Incident Description
<input type="checkbox"/>	2017-10-WF00002	2017 Oct Statewide Fire DR4344
<input type="checkbox"/>	2017-12-WF00003	2017December Wildfires DR4353
<input type="checkbox"/>	2019-07-EQ00025	2019 Ridgecrest Earthquake
<input type="checkbox"/>	2020-03-ID0029	2020 COVID-19
<input type="checkbox"/>	2021-12-ST00074	2021 December Winter Storms
<input type="checkbox"/>	2023-02-ST00090	2023 Feb/Mar Winter Storms

IBond/IIJA		
Select	IBond/IIJA	IBond/IIJA Description
<input type="checkbox"/>	IIJA Division A	Surface Transportation Reauthorization Act of 2021 (23 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division B	Surface Transportation Investment Act of 2021 (49 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division E	Drinking Water and Wastewater Infrastructure Act of 2021 (33 U.S.C. Sec. 1251 et seq.)
<input type="checkbox"/>	IIJA Division F	Broadband (47 U.S.C. Sec. 1701 et seq.)
<input type="checkbox"/>	IIJA Division G Title IX	Build America, Buy America Act (41 U.S.C. Sec. 8301 et seq.)
<input type="checkbox"/>	Prop 1	Water Quality, Supply, and Infrastructure Improvement Act of 2014

Save Notify

Step 5: Enter your **Business Unit (BU)** number in the BU field manually or find and select it using the look up icon (magnifying glass).

Form 810 Reports

Run Control ID OSDS_Test

Business Unit

Look Up Business Unit

Search by: begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-2 of 2 Last

Business Unit	Description
7760	Department of General Services
77601	DGS - Statewide Procurement

Step 6: Within the **Reporting Period** section select a **CAR Fiscal Year**.

The screenshot shows a form titled "Reporting Period". It contains a dropdown menu labeled "*CAR Fiscal Year" with the value "2022-2023" selected. Below the dropdown is a radio button labeled "Fiscal Year to Date" which is selected.

Note - If the **CAR Fiscal Year** field is left blank, the system will show a hard stop.

Step 7: Within the **Reporting Period** section, select **Fiscal Year to Date** or the **Custom Date Range** Option.

The screenshot shows the "Reporting Period" section. The "*CAR Fiscal Year" dropdown is set to "2022-2023". The "Fiscal Year to Date" radio button is selected, indicated by an orange arrow. The "Custom Date Range" option is also visible, with empty "From Date" and "To Date" input fields. A note below the fields reads "(Choose From and To Date within the selected CAR Fiscal Year)".

Note- If Custom Date Range is selected From Date and To Date will be required.

Step 8: Within the **Type of Report** section select **Individual Business Unit**.

The screenshot shows a form titled "Type of Report". It contains a checkbox labeled "Individual Business Unit" which is selected.

Step 9: After entering all the parameters click on the Save button.

Form 810 Reports

Run Control ID: osdstest Report Manager Process Monitor **Run**

Business Unit: 7760 Department of General Services

Reporting Period

*CAR Fiscal Year: 2022-2023

Fiscal Year to Date

Custom Date Range From Date: To Date: (Choose From and To Date within the selected CAR Fiscal Year)

Type of Report

Individual Business Unit

Exclude Mission Tasks

SelectAll De-SelectAll SelectAll De-SelectAll

Statewide Incidents			IBond/IIJA		
Select	Statewide Incident ID	Statewide Incident Description	Select	IBond/IIJA	IBond/IIJA Description
<input type="checkbox"/>	2017-10-WF00002	2017 Oct Statewide Fire DR4344	<input type="checkbox"/>	IIJA Division A	Surface Transportation Reauthorization Act of 2021 (23 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	2017-12-WF00003	2017 December Wildfires DR4353	<input type="checkbox"/>	IIJA Division B	Surface Transportation Investment Act of 2021 (49 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	2019-07-EQ00025	2019 Ridgecrest Earthquake	<input type="checkbox"/>	IIJA Division E	Drinking Water and Wastewater Infrastructure Act of 2021 (33 U.S.C. Sec. 1251 et seq.)
<input type="checkbox"/>	2020-03-ID0029	2020 COVID-19	<input type="checkbox"/>	IIJA Division F	Broadband (47 U.S.C. Sec. 1701 et seq.)
<input type="checkbox"/>	2021-12-ST00074	2021 December Winter Storms	<input type="checkbox"/>	IIJA Division G Title IX	Build America, Buy America Act (41 U.S.C. Sec. 8301 et seq.)
<input type="checkbox"/>	2023-02-ST00090	2023 Feb/Mar Winter Storms	<input type="checkbox"/>	Prop 1	Water Quality, Supply, and Infrastructure Improvement Act of 2014

Save **Notify**

Step 10: Click on the Run button on the Form 810 Reports page.



Step 11: After clicking on the **Run** button, a **Process Scheduler Request** page opens. Select the report and the format (XLS or PDF) you want to run and click on the **OK** button.

Process Scheduler Request

User ID Z_DEPT_PO_REPORTER Run Control ID osdstest

Server Name Run Date 06/26/2023

Recurrence Run Time 1:23:09PM

Time Zone 🔍

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Form 810 Contracting Activity	ZZ_PO_810CAR	BI Publisher	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	Form 810C Consulting Services	ZZ_PO_810CON	BI Publisher	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	Form 810E ERGSO Report	ZZ_PO_810ERG	BI Publisher	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	Form 810A IBond/IIJA Activity	ZZ_PO_810IBN	BI Publisher	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	Form 810SSB/DVBE Option Report	ZZ_PO_810SBD	BI Publisher	Web ▼	PDF ▼	Distribution



Step 12: After clicking on the **OK** button, the system will return to the Form 810 Reports page. Click on the **Process Monitor** link to view the success of generating the report.

Report Manager Process Monitor

Process Instance:22675913

Step 13: View the progress of the report in the **Run Status** column and **Distribution Status** column. Continue to click on the **Refresh** button until the Run and Distribution status changes to Success and Posted.

Process List | Server List

View Process Request For

User ID: Type: Last: 1 Days Refresh

Server: Name: Instance From: Instance To: Report Manager

Run Status: Distribution Status: Save On Refresh

Process List Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	22675913		BI Publisher	ZZ_PO_810CAR	Z_DEPT_PO_REPORTER	06/26/2023 1:23:09PM PDT	Success	Posted	Details

Go back to OSDS Form 810 Report

Save Notify

Step 14: After the report has successfully posted click on the **Go back to OSDS Form 810 Report** link to go back to the Form 810 Reports page.

[Go back to OSDS Form 810 Report](#)

Save Notify

Step 15: To access the report, click on the **Report Manager** link.

[Report Manager](#) Process Monitor Run

Process Instance:22675913

Step 16: After clicking the **Report Manager** link, a new page will open with multiple tabs. The report can be accessed by the **List** or the **Administration** tab. The default tab is the List tab. In the List tab under the report column, click on the report link.

[List](#) | [Explorer](#) | [Administration](#) | [Archives](#)

View Reports For

Folder Instance to [Refresh](#)

Name Created On Last 1 Days

Reports [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Calendar](#) First 1 of 1 Last

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 ZZ_PO_810CAR - ZZ_PO_810CAR.xlsx	ZZ_PO_810CAR - ZZ_PO_810CAR.XLSX	General	06/26/23 1:26PM	23261996	22675913

Step 17: After clicking on the report link a new page named Report will open.

Report

Report ID 23261996 Process Instance 22675913 [Message Log](#)

Name XMLP Process Type XML Publisher

Run Status Success

ZZ_PO_810CAR - ZZ_PO_810CAR.xlsx

Distribution Details

Distribution Node SFTP Expiration Date 06/25/2024

File List

Name	File Size (bytes)	Datetime Created
ZZ_810_INDV22675913.xml	5,203	06/26/2023 1:26:28.792656PM PDT
ZZ_PO_810CAR.xlsx	18,847	06/26/2023 1:26:28.792656PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	Z_DEPT_PO_REPORTER

[Return](#)

Step 18: Under the **File list** column click on the report link to download the report from the system.

File List

Name
ZZ_810_INDV22675913.xml
ZZ_PO_810CAR.xlsx

❖ A query in the system for data validation has been created. Here are the steps to access the Data Validation Query:

Step 1: To Access the data validation report, click on the **Process Monitor** link. In the Process Monitor page, under the Details column click the Details link after the Run Status shows Success.

Run Status	Distribution Status	Details
Success	Posted	Details

Step 2: In the Process Detail page click the View Log/Trace link.

Process Detail

Process

Instance 22675913	Type BI Publisher
Name ZZ_PO_810CAR	Description Form 810 Contracting Activity
Run Status Success	Distribution Status Posted

Run	Update Process
Run Control ID osdstest	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input type="radio"/> Delete Request
	<input type="radio"/> Re-send Content
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On 06/26/2023 1:25:31PM PDT	Parameters
Run Anytime After 06/26/2023 1:23:09PM PDT	Transfer
Began Process At 06/26/2023 1:25:44PM PDT	Message Log
Ended Process At 06/26/2023 1:26:43PM PDT	View Locks
	Batch Timings
	View Log/Trace

OK Cancel

Step 3: From the View Log/Trace page click on the Data Validation Query link.

View Log/Trace

Report

Report ID 23261995 Process Instance 22675913 Message Log
 Name ZZ_PO_810CAR Process Type XML Publisher
 Run Status Success

Form 810 Contracting Activity

Distribution Details

Distribution Node SFTP Expiration Date 06/25/2024

File List

Name	File Size (bytes)	Datetime Created
AE_ZZ_PO_810CAR_22675913.log	488	06/26/2023 1:26:43.588266PM PDT
AE_ZZ_PO_810CAR_22675913.trc	4,024	06/26/2023 1:26:43.588266PM PDT
Form 810 CAR - Data Validation Report.CSV	3,732,300	06/26/2023 1:26:43.588266PM PDT
ZZ_810_INDV22675913.xml	5,203	06/26/2023 1:26:43.588266PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	Z_DEPT_PO_REPORTER

[Return](#)

Step 4: Download the Data Validation Query.

File List	
Name	
AE_ZZ_PO_810CAR_22675913.log	
AE_ZZ_PO_810CAR_22675913.trc	
Form 810 CAR - Data Validation Report.CSV	
ZZ_810_INDV22675913.xml	

Note: The Data Validation Query is provided in the .csv format by the system, that can be saved in .xlsx format.

Here is the layout of the standard Contracting Activity report:

i) Left side of the report

ii) Right side of the report.

FORM 810 Contracting Activity Report

Run 7/22/2021 15:59:20 PM
Date/Time:
Run By User: Department PO Reporter
Report Type: Individual
Mission Tasks: Excluded

Fiscal Year: 2020-2021		Department: 8880 - Financial Information System																		
Part 2																				
Certified Small Business (SB)/Micro Business (MB) Participation in State Contracting Activity																				
Member of Contract %	Total to SB/MB Prime Contractors				Total to SB/MB Sub Contractors				Total to SB/MB Prime and Sub Contractors				Percentage of Total SB/MB Contracts				Share of SB/MB Contracts by Activity			
	Awarded Amount \$		Number of Contracts #		Awarded Amount \$		Number of Contracts with SB/MB Sub-contractors #		Awarded Amount \$		Number of Contracts with SB/MB participation (Prime)		SB/MB Participation %		Contracts with SB/MB Participation in All Contracts %		Dollars Awarded %		Number of Contracts %	
	M	N	O	P	Q (M+O)	R (N+P)	S (Q/A)	T (R/B)	QN	RN										
	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB
11%	8,116.41	88,417.75	4	16	0.00	0.00	0	0	8,116.41	88,417.75	4	16	4.05%	44.17%	10.81%	43.24%	0.15%	1.08%	22.22%	24.24%
70%	0.00	26,694.00	0	2	0.00	0.00	0	0	0.00	26,694.00	0	2	0.00%	49.35%	0.00%	50.00%	0.00%	0.32%	0.00%	3.03%
100%	0.00	0.00	0	0	0.00	0.00	0	0	0.00	0.00	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
119%	5,328,612.10	6,205,555.70	14	46	0.00	1,895,416.20	0	2	5,328,612.10	8,100,971.90	14	48	10.79%	16.40%	11.38%	39.02%	99.85%	98.60%	77.78%	72.73%
	0.00	0.00							0.00	0.00			0.00%	0.00%			0.00%	0.00%		
	5,336,728.51	6,320,667.45	18	64	0.00	1,895,416.20	0	2	5,336,728.51	8,216,083.65	18	66	10.75%	16.55%	10.98%	40.24%				
		11,657,395.96		82		1,895,416.20		2		13,552,812.16		84				51.22%				
	# of Certified SB's as Prime		# of		# of Awards to SB's as		# of Awards to SB's													
	45		3		84		3													

Note: The Form 810 report displays a "Mission Tasks" parameter on the top right section.

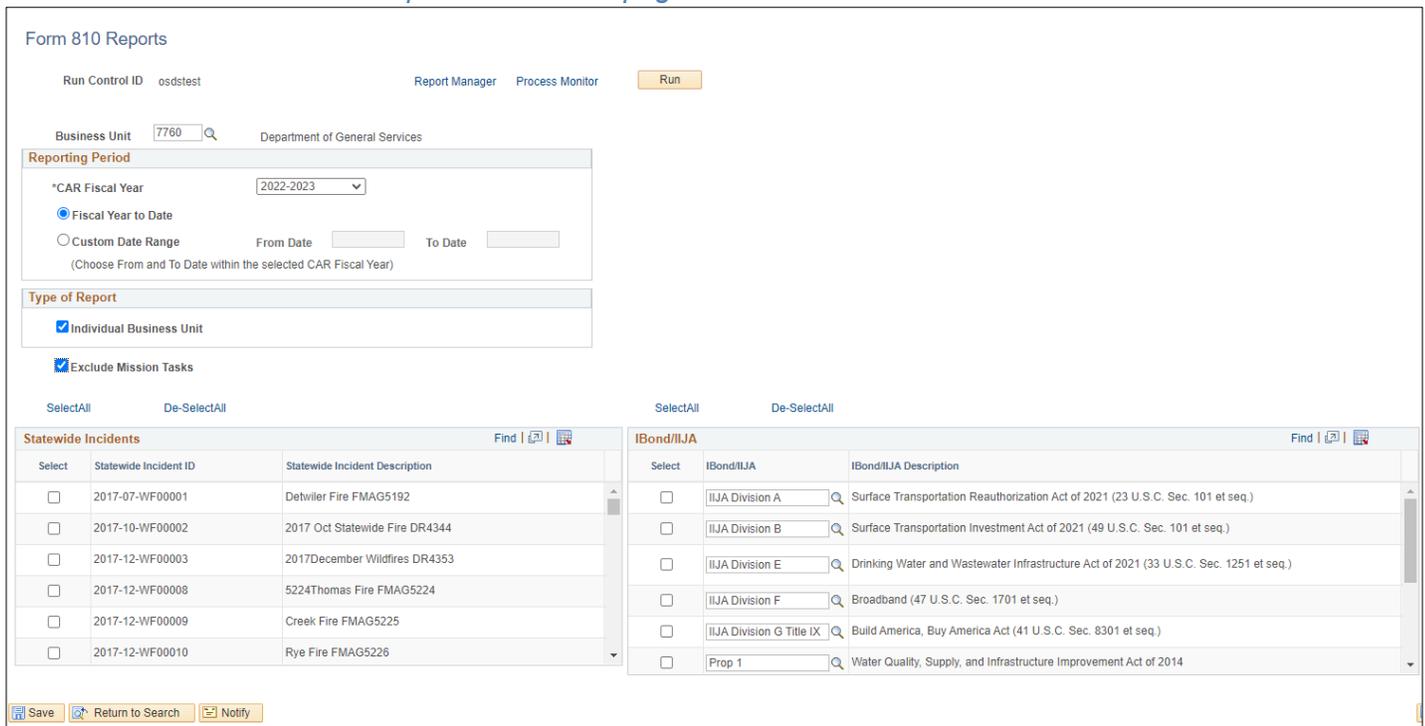
How to run the Form 810 report capturing all transactions **except the California Office of Emergency Services (CalOES) Mission Task ID and Statewide Incident IDs**

Select the following parameters on the Run control page:

- I. Standard Form 810 report selections. (Business Unit, Reporting Period, Type of Report)
- II. SKIP (do not select) any statewide Incident IDs and
- III. CHECK the Exclude Mission Tasks Check Box

After selecting the above parameters, follow the same steps used in running and accessing the standard Form 810. (Refer Pages 7-10)

Screenshot of the Form 810 Reports run control page:



The screenshot shows the 'Form 810 Reports' control page. At the top, there are navigation links for 'Run Control ID', 'osdstest', 'Report Manager', 'Process Monitor', and a 'Run' button. Below this, the 'Business Unit' is set to '7760' and 'Department of General Services'. The 'Reporting Period' section has '*CAR Fiscal Year' set to '2022-2023', with 'Fiscal Year to Date' selected. The 'Type of Report' section has 'Individual Business Unit' and 'Exclude Mission Tasks' checked. Below these are two tables: 'Statewide Incidents' and 'IBond/IIJA'. Both tables have 'SelectAll' and 'De-SelectAll' buttons above them. The 'Statewide Incidents' table lists several incidents with checkboxes. The 'IBond/IIJA' table lists various bond and infrastructure acts with checkboxes. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

Select	Statewide Incident ID	Statewide Incident Description
<input type="checkbox"/>	2017-07-WF00001	Detwiler Fire FMAG5192
<input type="checkbox"/>	2017-10-WF00002	2017 Oct Statewide Fire DR4344
<input type="checkbox"/>	2017-12-WF00003	2017December Wildfires DR4353
<input type="checkbox"/>	2017-12-WF00008	5224Thomas Fire FMAG5224
<input type="checkbox"/>	2017-12-WF00009	Creek Fire FMAG5225
<input type="checkbox"/>	2017-12-WF00010	Rye Fire FMAG5226

Select	IBond/IIJA	IBond/IIJA Description
<input type="checkbox"/>	IIJA Division A	Surface Transportation Reauthorization Act of 2021 (23 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division B	Surface Transportation Investment Act of 2021 (49 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division E	Drinking Water and Wastewater Infrastructure Act of 2021 (33 U.S.C. Sec. 1251 et seq.)
<input type="checkbox"/>	IIJA Division F	Broadband (47 U.S.C. Sec. 1701 et seq.)
<input type="checkbox"/>	IIJA Division G Title IX	Build America, Buy America Act (41 U.S.C. Sec. 8301 et seq.)
<input type="checkbox"/>	Prop 1	Water Quality, Supply, and Infrastructure Improvement Act of 2014

Note: By selecting the above parameters, the Form 810 report could help departments and OSDS analyze and determine if the SB and/or DVBE participation goals would have been met if any of the OES mission-tasked and/or Statewide Incident-related transactions had not been included.

The system displays the below warning message when running the report. Click “OK” to continue.



Here is the layout of the Contracting Activity report without the Mission Task and Statewide Incidents transactions:

i) Left side of the report

Agency: General Government																
Contracting Activity Category	Part 0				Part 1											
	Total State Contracting Activity				Certified Disabled Veteran Business Enterprise (DVBE) Participation in State Contracting Activity											
	Total Contract*		Share of Total		Total to DVBE Prime		Total to DVBE Sub Contractors		Total to DVBE Prime and Sub		Percentage of Total		Share of DVBE			
Awarded Amount \$	Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	Awarded Amount \$	Number of Contracts #	Awarded Amount \$	Number of Sub Contracts awarded to DVBE #	Number of Contracts with DVBE Sub-contractors #	Awarded Amount \$	Number of Contracts with DVBE participation (Prime or Sub) #	Total Number of DVBE Contracts #	DVBE Participation %	Contracts with DVBE Participation in All Contracts %	Dollars Awarded %	Number of Contracts %	
A	B	AN	BN	C	D	E	FM	F	G (C+E)	HM (D+FM)	H (D+F)	I (G/A)	J (H/B)	GN	HN	
1. Goods (Non-IT)	200,193.99	37	0.40%	22.56%	3,605.40	3	0.00	0	0	3,605.40	3	3	1.80%	8.11%	0.10%	8.11%
2. Services (Non-IT)	54,094.00	4	0.11%	2.44%	1,694.00	1	0.00	0	0	1,694.00	1	1	3.13%	25.00%	0.05%	2.70%
3. Construction (Non-IT Services - Public Works)	0.00	0	0.00%	0.00%	0.00	0	0.00	0	0	0.00	0	0	0.00%	0.00%	0.00%	0.00%
4. IT (Goods and Services)	49,395,596.01	123	99.49%	75.00%	2,644,729.80	31	861,271.23	2	2	3,506,001.03	33	33	7.10%	26.83%	99.85%	89.19%
5. Cal Card Transactions	0.00	0	0.00%	0.00%	0.00					0.00			0.00%		0.00%	
TOTALS	49,649,884.00	164			2,650,029.20	35	861,271.23	2	2	3,511,300.43	37	37	7.07%	22.56%		
					# of Certified DVBE's as	# of Certified DVBE's as Subs	# of Awards to DVBE's as Prime	# of Awards to DVBE's								
					12	2	35	2								
Comments:																

ii) Right side of the report

FORM 810 Contracting Activity Report

Run Date/Time: 7/22/2021 15:59:20 PM

Run By User: Department PO Reporter

Report Type: Individual

Mission Tasks: Excluded

Fiscal Year:		2020-2021																								
Department:		8880 - Financial Information System																								
Part 2																										
Certified Small Business (SB)/Micro Business (MB) Participation in State Contracting Activity																										
BE mber of tract %	Total to SB/MB Prime Contractors					Total to SB/MB Sub Contractors					Total to SB/MB Prime and Sub Contractors					Percentage of Total SB/MB Contracts				Share of SB/MB Contracts by Activity						
	Awarded Amount \$		Number of Contracts #			Awarded Amount \$		Number of Sub Contracts awarded to SB/MB #			Number of Contracts with SB/MB Sub-contractors #		Awarded Amount \$		Number of Contracts with SB/MB participation (Prime RM (N+PM))		Number of SB/MB Contracts #		SB/MB Participation %		Contracts with SB/MB Participation in All Contracts %		Dollars Awarded %		Number of Contracts %	
	M		N			O		PM			P		Q (M+O)		R (N+P)		S (Q/A)		T (R/B)		QN		RN			
	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB		
11%	8,116.41	88,417.75	4	16	0.00	0.00	0	0	0	0	8,116.41	88,417.75	4	16	4	16	4.05%	44.17%	10.81%	43.24%	0.15%	1.08%	22.22%	24.24%		
70%	0.00	26,694.00	0	2	0.00	0.00	0	0	0	0	0.00	26,694.00	0	2	0	2	0.00%	49.35%	0.00%	50.00%	0.00%	0.32%	0.00%	3.03%		
00%	0.00	0.00	0	0	0.00	0.00	0	0	0	0	0.00	0.00	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		
19%	5,328,612.10	6,205,555.70	14	46	0.00	1,895,416.20	0	2	0	2	5,328,612.10	8,100,971.90	14	48	14	48	10.79%	16.40%	11.38%	39.02%	99.85%	98.60%	77.78%	72.73%		
	0.00	0.00									0.00	0.00					0.00%	0.00%			0.00%	0.00%				
	5,336,728.51	6,320,667.45	18	64	0.00	1,895,416.20	0	2	0	2	5,336,728.51	8,216,083.65	18	66	18	66	10.75%	16.55%	10.98%	40.24%						
		11,657,395.96		82		1,895,416.20		2		2		13,552,812.16		84		84		27.30%			51.22%					
	# of Certified SB's as Prime	# of	# of Awards to SB's as	# of Awards to SB's																						

Note: The Form 810 report displays the "Mission Tasks" parameter on the top right section. It identifies if the Form 810 report includes or excludes the mission task transactions. Also, this report has an additional tab that shows the list of all the statewide incidents, if selected on the Run Control Page.

How to run a Form 810-report that only captures transactions with Cal OES Mission task ID and Statewide Incident IDs:

Select the following parameters on the Run control page:

- I. Standard Form 810 report selections (Business Unit, Reporting Period, Type of Report).
- II. SELECT Statewide Incidents ID and
- III. SKIP (do not check) the Exclude Mission Tasks Check Box.

After selecting the above parameters, follow the same steps used in running and accessing the standard Form 810. (Refer Pages 5-8)

Screenshot of the Form 810 Reports run control page:

Form 810 Reports

Run Control ID: osdstest Report Manager Process Monitor **Run**

Business Unit: 7760 Department of General Services

Reporting Period

*CAR Fiscal Year: 2022-2023

Fiscal Year to Date

Custom Date Range From Date: To Date: (Choose From and To Date within the selected CAR Fiscal Year)

Type of Report

Individual Business Unit

Exclude Mission Tasks

SelectAll De-SelectAll SelectAll De-SelectAll

Statewide Incidents			IBond/IIJA		
Select	Statewide Incident ID	Statewide Incident Description	Select	IBond/IIJA	IBond/IIJA Description
<input type="checkbox"/>	2017-07-WF00001	Detwiler Fire FMAG5192	<input checked="" type="checkbox"/>	IIJA Division A	Surface Transportation Reauthorization Act of 2021 (23 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	2017-10-WF00002	2017 Oct Statewide Fire DR4344	<input checked="" type="checkbox"/>	IIJA Division B	Surface Transportation Investment Act of 2021 (49 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	2017-12-WF00003	2017December Wildfires DR4353	<input checked="" type="checkbox"/>	IIJA Division E	Drinking Water and Wastewater Infrastructure Act of 2021 (33 U.S.C. Sec. 1251 et seq.)
<input type="checkbox"/>	2017-12-WF00008	5224Thomas Fire FMAG5224	<input checked="" type="checkbox"/>	IIJA Division F	Broadband (47 U.S.C. Sec. 1701 et seq.)
<input type="checkbox"/>	2017-12-WF00009	Creek Fire FMAG5225	<input checked="" type="checkbox"/>	IIJA Division G Title IX	Build America, Buy America Act (41 U.S.C. Sec. 8301 et seq.)
<input type="checkbox"/>	2017-12-WF00010	Rye Fire FMAG5226	<input checked="" type="checkbox"/>	Prop 1	Water Quality, Supply, and Infrastructure Improvement Act of 2014

Save **Return to Search** **Notify**

The system displays the below warning message when running the report. Click “OK” to continue.

Message

Warning: (25005,2389)

This report is limited to only include transactions based on the Statewide Incident Description(s) and Mission Task check box you have selected.

OK

Here is the layout of the Contracting Activity report that only captures transactions with Cal OES Mission task ID and Statewide Incident IDs:

i) Left side of the report

Agency: General Government																				
Contracting Activity Category	Part 0				Part 1															
	Total State Contracting Activity				Total to DVBE				Total to DVBE Sub				Total to DVBE Prime and Sub				Enterprise (DVBE) Participation in State Contracting Activity			
	Awarded Amount \$	Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	Awarded Amount \$	Number of Contracts #	Awarded Amount \$	Number of Contracts #	Number of Contracts awarded to DVBE #	Number of Contracts with DVBE Sub-contractors #	Awarded Amount \$	Number of Contracts with DVBE participation (Prime or Sub) #	Total Number of DVBE Contracts #	DVBE Participation %	Contracts with DVBE Participation in All Contracts %	Dollars Awarded %	Number of Contracts %			
	B	AN	BN	C	D	E	FM	F		G (C+E)	HM (D+FM)	H (D+F)	I (G/A)	J (H/B)	GN	HN				
1. Goods (Non-IT)	52,246.75	3	0.50%	30.00%	0.00	0	0.00	0	0	0.00	0	0	0.00%	0.00%	0.00%	0.00%				
2. Services (Non-IT)	0.00	0	0.00%	0.00%	0.00	0	0.00	0	0	0.00	0	0	0.00%	0.00%	0.00%	0.00%				
3. Construction (Non-IT Services, Public Works)	0.00	0	0.00%	0.00%	0.00	0	0.00	0	0	0.00	0	0	0.00%	0.00%	0.00%	0.00%				
4. IT (Goods and Services)	10,420,461.83	7	99.50%	70.00%	24,716.00	1	0.00	0	0	24,716.00	1	1	0.24%	14.29%	100.00%	100.00%				
5. Cal Card Transactions	0.00	0	0.00%	0.00%	0.00					0.00			0.00%		0.00%					
TOTALS	10,472,708.58	10			24,716.00	1	0.00	0	0	24,716.00	1	1	0.24%	10.00%						
				# of Certified				# of Certified DVBE's as				# of Awards to DVBE's as Prime				# of Awards to DVBE's				
				1				0				1				0				
Comments:																				

ii) Right side of the report

Activity Report

Run 7/22/2021
 Run By Department
 Report Individual
Mission Included

Fiscal Year: 2020-2021		Department: 8880 - Financial Information System																						
Part 2																								
Certified Small Business (SB)/Micro Business (MB) Participation in State Contracting Activity																								
SE	Total to SB/MB Prime				Total to SB/MB Sub				Total to SB/MB Prime and Sub Contractors				Percentage of Total SB/MB				Share of SB/MB Contracts by Activity							
	Awarded Amount \$		Number of Contracts #		Awarded Amount \$		Number of Sub Contracts awarded to SB/MB #		Number of Contracts with SB/MB Sub-contractors #		Awarded Amount \$		Number of Contracts with SB/MB participation (Prime)		Number of SB/MB Contracts #		SB/MB Participation %		Contracts with SB/MB Participation in All Contracts %		Dollars Awarded %		Number of Contracts %	
	M	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB
IN	M		N		O		PM		P		Q (M+O)		RM (N+PM)		R (N+P)		S (Q/A)		T (R/B)		QN		RN	
	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB	SB	MB
00%	39,123.00	11,200.00	1	1	0.00	0.00	0	0	0	0	39,123.00	11,200.00	1	1	1	1	74.88%	21.44%	33.33%	33.33%	15.19%	30.95%	33.33%	33.33%
00%	0.00	0.00	0	0	0.00	0.00	0	0	0	0	0.00	0.00	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
00%	0.00	0.00	0	0	0.00	0.00	0	0	0	0	0.00	0.00	0	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
00%	218,390.00	24,991.36	2	2	0.00	0.00	0	0	0	0	218,390.00	24,991.36	2	2	2	2	2.10%	0.24%	28.57%	28.57%	84.81%	69.05%	66.67%	66.67%
	0.00	0.00									0.00	0.00					0.00%	0.00%			0.00%	0.00%		
	257,513.00	36,191.36	3	3	0.00	0.00	0	0	0	0	257,513.00	36,191.36	3	3	3	3	2.46%	0.35%	30.00%	30.00%				
	293,704.36	6	0.00	0	0	0	0	0	0	0	293,704.36	6	6	6	6	2.80%	60.00%							
	# of Certified SB's as		# of		# of		# of Awards to SB's																	

Note: The Form 810 report displays the "Mission Tasks" parameter on the top right section. It identifies if the Form 810 report includes or excludes the mission task transactions. Also, this report has an additional tab that shows the list of all the statewide incidents if selected on the Run Control Page.

- ❖ The system will generate a relevant data validation query report for the different Form 810 reports mentioned above. The parameters selected on the run control page will not change the layout of the Data Validation Query report.

Screenshot of the Data Validation Query report with the updated columns:

AQ	AR	AS	AT
Statewide Incident	Statewide Incident Description	Mission Task	Mission Task Description
2020-03-ID0029	2020 COVID-19	M62000 T54616	Contract for COVID 19 response Facilities cleaning and disinfection
2020-03-ID0029	2020 COVID-19	M61998 T54055	Contract for Response Facilities Cleaning & Disinfection
2020-03-ID0029	2020 COVID-19	M62000 T54087	Contract for COVID19-1 Response Ambulance Services
2020-03-ID0029	2020 COVID-19	M63217 T55019	Contract for COVID19 Response CDPH Copier Rental
2020-03-ID0029	2020 COVID-19	M62000 T54616	Contract for COVID19-1 Response CDPH 40 Yard Dumpster Rental
2020-03-ID0029	2020 COVID-19	M63217 T55017	Contract for COVID19 Response CDPH Copier Rental
2020-03-ID0029	2020 COVID-19	M60090 T55691	Contract for COVID19 -1 Response CDPH Copier Rental
2020-03-ID0029	2020 COVID-19	M62000 T53069	Contract for COVID19 Response Border Security
2020-03-ID0029	2020 COVID-19	M63217 T55020	Portable Toilet and Handwashing Station Rentals
2020-03-ID0029	2020 COVID-19	M62000 T54742	Port-A-Cool Fans x2, 100 ft 2 gauge Extension Cords x2, 100 ft heavy duty water hoses x2
2020-03-ID0029	2020 COVID-19	M62000 T55590	Powershred 60Cs Cross-Cut Shredder
2020-03-ID0029	2020 COVID-19	M63074 T55029	72 cases of shelf stable meals
2020-03-ID0029	2020 COVID-19	M61998 T54033	fence rental w/windscreen & sandbags
2020-03-ID0029	2020 COVID-19	M62000 T54176	fence rental for shelter/testing/vaccination site
2020-03-ID0029	2020 COVID-19	M61998 T54089	Standard plastic cold wash stations, Plastic ADA Toilets, Daily janitorial
2020-03-ID0029	2020 COVID-19	M63074 T55444	3 specialized whiteboards - mobile, dry erase, easel easy flip
2020-03-ID0029	2020 COVID-19	M60385 T56000	Toner Cartridges
2020-03-ID0029	2020 COVID-19	M61998 T54070	Forklift and Pallet Jack Rental for vaccination & testing site

How to run an Infrastructure Bond/ Infrastructure Investment and Jobs Act Report

To run and access the Form 810 A report, use the same steps as “[How to run standard Consolidated Annual Report form](#)”. At step 11 (Page 8), select Form 810 A.

Process Scheduler Request

User ID **Z_DEPT_PO_REPORTER** Run Control ID **osdstest**

Server Name Run Date

Recurrence Run Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Form 810 Contracting Activity	ZZ_PO_810CAR	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Form 810C Consulting Services	ZZ_PO_810CON	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Form 810E ERGSO Report	ZZ_PO_810ERG	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Form 810A IBond/IJA Activity	ZZ_PO_810IBN	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Form 810SSB/DVBE Option Report	ZZ_PO_810SBD	BI Publisher	Web	PDF	Distribution

Here is the layout of the Infrastructure Bond/ Infrastructure Investment and Jobs Act Report:

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES
PROCUREMENT DIVISION

Form 810 A IBond/IJA Act Report

Run By: Department PO Reporter
Run Date: 6/26/23
Run Time: 13:45:43 PM
Report Type: Individual

Agency: Government Operations		Part 1 Certified Disabled Veteran Business Enterprise (DVBE) Participation				Part 2 Certified Small Business/Micro Business (SB/MB) Participation							
IBond/IJA ID and IBond/IJA Dollars	IBond/IJA Total Contract \$	IBond/IJA Total \$ to DVBE Prime Contractors	IBond/IJA Total \$ to DVBE Sub Contractors	IBond/IJA Total \$ to DVBE Prime & Sub Contractors	IBond/IJA Total DVBE %	IBond/IJA Total \$ to SB/MB Prime Contractors	IBond/IJA Total \$ to SB/MB Sub Contractors	IBond/IJA Total \$ to SB/MB Prime & Sub Contractors	IBond/IJA Total SB/MB %				
A		B	C	D (B+C)	E (D/A)	F		G		H (F+G)		I (H/A)	
						SB	MB	SB	MB	SB	MB	SB	MB
IIJA Division A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division E	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division F	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division G Title IX	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1D	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1E	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The Small Business Improvement Plan must include an I Bond Action Plan when participation specific to I Bonds is less than 25%

Comments:

Approver's Information			
Name:		Title:	
Signature:		Date:	
Telephone:		Fax:	
Email:		City & Zip:	

The system will generate a separate data validation query report with the Form 810A.

Screenshot of the Form 810 A IBond_IIJA - Data Validation Query report with the IIJA columns:

SB Option Reported Amount \$	DVBE Option Reported Amount \$	IBond/IIJA Number	IBond/IIJA Description	Exempt from SB Goal-IIJA only
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N
0	0			N