



California
DEPARTMENT OF TECHNOLOGY

CAMS NextGen Contractor User Guide

California Department of Technology



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1 Introduction

This user guide aims to help users to navigate and utilize the application and set guidelines for the efficient use of CAMS NextGen. For any general questions not covered in this document, please feel free to contact CALNETHelp@state.ca.gov.

2 Accessing and Navigating CAMS NextGen

2.1 Access

To access CAMS NextGen, navigate to the following URL:

<https://services.cdt.ca.gov/camsngen>

Enter the username and password provided to you by CALNET and click 'Log In'. If you have forgotten your password, click on the 'Forgot Password?' link and follow the prompts to reset your password.

If you still cannot login successfully, please contact CALNETHelp@state.ca.gov and a representative will contact you.

2.2 Navigation

Cams NextGen contains the following modules designed to allow contractors to autonomously upload and troubleshoot required and standardized CALNET reports and to provide access to the latest CALNET information useful to contractors:



Upload a New File

Upload a New Data File



Uploaded Files

View List of Previously Uploaded Data Files



Customers

View List of CALNET Customers



CATR/ATRs

View list of CATRs and ATRs



ATOs

View Existing Authorizations to Order



Services

List of Services

2.2.1 Upload New File

Prior to uploading a file, a contractor should ensure the file is prepared according to the latest CALNET Business Requirements and Data Guidelines. Then follow the steps outlined below to upload the file.

1. Enter the 'Upload a New File' module (Note: Only those users responsible for submitting CALNET files should access this module).
2. Check the first field 'Contractor Name' to ensure this field correctly displays the appropriate name for your business. If your business name does not accurately display what is expected in this field, do not continue, and send an email to CALNETHelp@state.ca.gov describing the problem.

3. Click in the 'File Type' field to open a drop-down selection of different file types supported by CAMS NextGen. Choose the file type you wish to upload.
4. Click in the 'Service Month' and 'Service Year' fields and select the correct month and year for the report you are uploading.
5. For the 'Summary of Expenditures by Service' quarterly file type, select the last month and year of the of the quarter being reported. (i.e. for a quarterly report covering Jan-March of 2024, the contractor would select March as the service month and 2024 as the service year).
6. After all required fields are populated, press the 'Add Attachments' button, and select the desired file to upload to CAMS NextGen.
 - **Note:** *After attaching a file, CAMS NextGen will perform a data integrity check to validate common issues that cause a file to be rejected. A pop-up message will appear instructing the user to wait until the 'Close' button appears which may take several minutes depending on the size of the uploaded file. It is important that you do not navigate away from this screen or refresh your browser during this time.*
7. Once the 'Close' button becomes active on the data validation screen, press that button to dismiss it. CAMS NextGen is now ready for you to submit the file for processing. Press the 'Submit' button in the upper right corner, and you should then see a screen confirming acceptance. The 'Upload a New File' process is now complete, and you may close your browser.

For more details and suggestions for resolving issues that may occur during this process, refer to Section 3 Troubleshooting Tips.

2.2.2 Uploaded Files

To view uploaded files, enter the 'Uploaded Files' module. This module will display a list of all contractor's files that have been submitted to CAMS NextGen. The following fields are displayed:

- **Number:** Displays a unique code assigned to a submitted file.
 - Clicking on this field will retrieve any potential error logs or the original attached file to assist with correcting upload failures.
- **Status:** Displays the status of a submitted file. This value can be:
 - **Success:** File has been validated and accepted into CAMS NextGen.
 - **Error:** File failed validation and was not accepted into CAMS NextGen.
 - **Cancelled:** File did not complete validation and was not accepted into CAMS NextGen.
 - **Deleted:** File was previously uploaded successfully but was later marked as 'Deleted' by CAMS NextGen administrators (usually at the contractor's request to correct a problem). The file's previously accepted contents have been deleted from CAMS NextGen.
 - **Running:** File is currently being processed by CAMS NextGen. This can take an extended period depending on the file size.
 - **Pending:** File is in queue to be processed once CAMS NextGen internal resources are available. The file may remain in Pending status for an extended period depending on the number and size of files in the CAMS NextGen job queue.

- **Note: A status can never be changed by a contractor as it is a read-only field which is displayed in real-time.**
- **File Type:** Displays the type of file that was uploaded to CAMS NextGen. The file types are:
 - Services Billed by Charge Type
 - Services Billed
 - Summary of Expenditures by Services
 - Service Catalog 2
 - **Note: The required file types to submit vary by contract and are defined in the CALNET business requirements and Data Guidelines.**
- **Service Year:** The service year being reported on by the uploaded file.
- **Service Month:** The service month being reported on by the uploaded file.
- **Uploaded File Name:** The name used on the .zip file that was uploaded.
- **Created by:** The username of the account used to log in and upload the file.

Filtering and Sorting Data:

- The above fields can be sorted by clicking on the header names to rearrange the view. To change the uploaded files list view, click on any of the field headers and sort the list as desired.
- A filter button is available in the upper left portion of the table for additional filtering or sorting. Filters may be saved and reused.
- Above the filter icon is a 3-line “hamburger” button. Clicking on this button provides a dropdown list for exporting the view to a PDF, Excel, or CSV file.
- To return to the home page, click the ‘Home’ button at the very top left of the screen.

2.2.3 Customers

To view a list of the CALNET customers, enter the ‘Customers’ module. This module will display the most recent list of CALNET customers. This list is maintained by the CALNET program and must be used by all contractors when reporting to the CALNET program. CAMS NextGen will use this list to validate the customers provided on each uploaded file. Any differences in Customer Code, Customer Name, Sector, and Sub-Sector shall result in file validation errors.

The following fields are displayed:

- **Customer Code:** A unique code assigned to this customer by the CALNET program.
- **Customer Name:** The name of the customer as identified and provided by the CALNET program.
- **NESPA:** (Non-State Agency Service Policy and Agreement)
 - For Non-State customers, displays whether they have a NESPA agreement or not (‘Yes’ or ‘No’).
 - For State Agencies, this field will always display ‘N/A’.
- **Sector:** Displays the customer’s sector of government as either ‘State’ or ‘Non-State’.
- **Subsector:** Displays the customer’s subsector of government:
 - If customer’s sector is ‘State’, one of the following shall appear:
 - Executive

- Higher Ed
 - Non-Executive
- If customer's sector is 'Non-State', one of the following shall appear:
 - City
 - County
 - Education
 - Federal Tribe
 - Other
- **CALNET 5 ATO:** Indicates non-state customer eligibility to order from CALNET 5.
 - **Authorized:** The customer's CALNET 5 ATO has been established, and the customer is authorized to order from all CALNET contracts (CALNET 4, CALNET 5, and future contracts) and from any CALNET contractor.
 - **Unresolved:** The customer has not yet submitted a CALNET 5 ATO. CALNET 5 services cannot be ordered by this customer until they have established a CALNET 5 ATO. The customer may order CALNET 4 services if they have established a CALNET 4 ATO for the specific contractor they wish to order CALNET 4 services from.
 - **Ineligible:** The customer's CALNET 5 ATO has been denied, and the customer is not authorized to order from CALNET contracts.
 - **N/A:** The customer is a state agency and can order from CALNET contracts without establishing a CALNET 5 ATO. A Form 20 signed by their CATR or ATR is still required for each order.
- **Updated:** Displays the time stamp of the last edit made to this customer.

Note: *Sorting this field to display most recent to least recent can be helpful to quickly identify the most recent changes to the customer list.*

***The same filtering and sorting features listed in section 2.2.2 are available in this module.**

2.2.4 CATRs/ATRs

To view a list of the CATRs/ATRs, enter the 'CATRs/ATRs' module. This module will display the most recent list of all CALNET CATRs (Chief Agency Telecommunications Representatives) and ATRs (Agency Telecommunications Representatives).

The following fields are displayed:

- **Customer Name:** Displays the customer the CATR/ATR represents.
- **First Name:** Displays the first name of the CATR/ATR.
- **Last Name:** Displays the last name of the CATR/ATR.
- **CATR/ATR:** Displays whether this representative is designated as a CATR or ATR.
- **Updated:** Displays the time stamp of the last edit made to the CATR/ATR.

***The same filtering and sorting features listed in section 2.2.2 are available in this module.**

2.2.5 ATOs

To view a list of ATOs, enter the 'ATO's' Module. This module will display a list of all ATOs (Authorization to Order(s)) submitted by the contractor.

The following fields are displayed:

- **Contractor Name:** Displays the name of the contractor.
- **Customer Code:** Displays the customer code for use on the ATO.
- **Customer Name:** Displays the customer name for the ATO.
- **Service Offering:** Displays the CALNET service offering represented on the ATO.

***The same filtering and sorting features listed in section 2.2.2 are available in this module.**

2.2.6 Services

To view a list of CALNET contracted services, enter the 'Services' module. This list must be used by all Contractors when reporting to the CALNET program. CAMS NextGen will use this list when validating the service information provided on each uploaded file. Any differences in Subcategory, Section Number, and Service Type shall result in file validation errors.

The following fields are displayed:

- **Category:** The CALNET Category Number from which the service has been procured.
- **Category Name:** The CALNET Category name from which the service has been procured.
- **Subcategory:** The CALNET Subcategory from which the service has been procured.
- **Section Number:** The number of the service grouping as defined in each table heading of the Contractor's Catalog.
- **Service Type:** The name of the service grouping as defined in each table heading of the Contractor's Catalog.
- **Status:** Displays if the service is currently considered 'Active' or 'Inactive' on CALNET.

***The same filtering and sorting features listed in section 2.2.2 are available in this module.**

3 Troubleshooting Tips

The following table provides a list of the most common issues that may arise when uploading a file to CAMS NextGen. For any issues listed here or otherwise that cannot be self-corrected, please contact CALNETHelp@state.ca.gov for assistance.

#	Issue	Resolution
1	It is taking a very long time for the uploaded file to finish processing.	This is expected behavior depending on the file size, amount of data, and the number of files in the CAMS NextGen job queue. If the file has not completed processing after 24 hours, it will automatically be marked 'Cancelled' and will be investigated by CALNET.
2	Attempting to attach a file displays error: "Attached file exceeds file size Limit. Please contact CALNET help".	The maximum unzipped text file size as of this document's creation is 1500 MB. Reduce the file size if possible.
3	Attempting to attach a file displays error: "Uploaded .zip contains multiple files. Please ensure .zip only contains one .txt file".	Files uploaded to CAMS NextGen shall only consist of one .txt file compressed into a single .zip file. Remove any extra files in the .zip package.
4	Attempting to attach a file displays error: "Invalid File Type Inside ZIP, please verify and reupload the file".	Files uploaded to CAMS NextGen shall only consist of one .txt file compressed into a single .zip file. Ensure compressed file is in .txt format.
5	Attempting to attach a file displays error: "Please attach a file without spaces in the name".	.Txt files shall not contain any spaces or blank characters. Ensure .txt file name does not have any spaces or blank characters.
6	Attempting to attach a file displays error: "Uploaded zip name and the .txt name are different".	CAMS NextGen requires that the .txt file and .zip container have the same name. Ensure your .txt and .zip file are created with the same name.
7	Attempting to attach a file displays error: "Please attach a valid .zip file for upload and it cannot be a duplicate file".	CAMS NextGen will not allow a duplicate file name IF the same file name was previously uploaded to CAMS NextGen and currently has a 'Success' status in 'Uploaded Files'. To correct, please provide a unique name for this file.
8	Attempting to attach a file displays error: "Invalid Headers or .txt file encoding, please verify and reupload the file".	<p>This can be one of two issues:</p> <ol style="list-style-type: none"> 1) CAMS NextGen has detected that the header row in your file does not EXACTLY match the header defined in the data guidelines. This includes the field name, field order, case sensitivity, or even hidden blank spaces. To correct, ensure your headers match the data guidelines EXACTLY. 2) This error may also appear if the .txt file was saved using BOM (Byte Order Marking) encoding. You can see

#	Issue	Resolution
		what encoding a file has by simply opening the .txt file in a text editor such as Notepad and checking the very bottom right- Ideally something like 'UTF-8' will be displayed. If you see 'BOM' anywhere, simply choose 'File' then 'Save As'. The resulting window will have an 'Encoding' drop down next to the 'Save' button that you can use to choose 'UTF-8', and not 'UTF with BOM' and save.
9	Exported error report is truncated.	This is a known limitation in ServiceNow where the number of rows returned for .xls and .csv files is restricted. Resolve the errors in the initial upload and upload the corrected file to narrow the error returns.
10	Uploaded file is processed but has an error or cancelled status with the following message in the 'Validation Summary' field in the 'Uploaded Files' section: "Quotation marks found in data; please remove quotation marks and reupload file"	<p>This occurs due to a native issue in .net that can sometimes result in data in a field being skipped due to the positioning of a quotation mark character.</p> <p>One way to resolve this is to use a document with a find-and-replace feature to locate quotation marks and replace with any other ascii characters.</p>
11	Uploaded file is processed but has an error or cancelled status with the following message in the 'Validation Summary' field in the 'Uploaded Files' section: "Unexpected amount of pipe delimiters in file. Please check your source for file correct amount of data."	<p>This usually occurs when there is an unexpected formatting of the source file. It has detected an amount of delimiter characters inconsistent with a properly formatted file.</p> <p>To resolve this, double-check your file formatting in the source file and ensure your delimiters are pipe characters and the correct amount are present.</p>
12	Uploaded file is processed but has an error or cancelled status with the following message in the 'Validation Summary' field in the 'Uploaded Files' section: "Count of validated records does not match count of qualifying source file records Total number of rows from import set - X Ignored - X Skipped - X Errors".	<p>This occurs when CAMS NextGen compares the number of valid records found during processing does not match the original amount counted during initial source file validation and halts the process to ensure data integrity.</p> <p>To resolve this, double-check your file formatting in the source file and ensure that each line has the correct pipe delimiter characters, and a carriage return/line feed character (cr/lf) at the end. You may need to view the file under a text editor that supports this, such as notepad ++ and enable the viewing of these special characters.</p>

Appendix A

Process Changes

CAMS NextGen was designed to minimize the need for contractors to change any of their existing processes for providing CALNET their reports, however some changes have been made in service of application architecture or improving data integrity.

- Currently, Contractors may be providing separate files for the same file type that covers multiple contracts. For example, a contractor may provide a different Services Billed by Charge Type report for the month of July broken out by 'C3' and 'C4'.

For CAMS NextGen, there will no longer be multiple reports. Contractors currently adhering to the above example will consolidate all monthly data into a single .txt file for each report type.

- Service Catalog 1 will no longer be required to be uploaded in CAMS NextGen.
- Currently, contractors upload a separate Service Catalog 2 file for each subcategory, and if changes are needed, a CALNET representative must delete an existing file before it can be updated.

For CAMS NextGen, contractors will consolidate all their Service Catalog 2 data into a single file for upload. Anytime changes are needed to Service Catalog 2 the contractor will make those changes to the consolidated file and upload the latest version of the consolidated file as needed; CALNET does not need to delete any previous entries as a prerequisite, the system will automatically delete any previous data for this contractor on successful upload validation.

- Currently, contractors email CALNET reporting team a copy of their quarterly Summary of Expenditures by Service report.

For CAMS NextGen, contractors will be asked to upload their quarterly Summary of Expenditures by Service report to CAMS NextGen (using the last month of the quarter being reported on as the Service Month and Service Year when uploading the file).

- Currently, contractors email CALNET reporting team a copy of their Services Billed Summary Data report.

For CAMS NextGen, contractors will be asked to upload their Services Billed Summary Data report to CAMS NextGen.

- For contractors who upload the 'Services Billed' file type, the 'Services Billed Tax Detail' file will no longer be required to be uploaded to CAMS NextGen.

Resolving Common Issues

- Report files can be quite large when uploading, extracting, and submitting on the backend. Ensuring your browser's cache is regularly cleared or uploading via incognito/private tabs will help to successfully upload a file.
- CAMS NextGen can only display ASCII characters. Please make sure your report/catalog data is generated directly from a keyboard, and not copied directly from a document that can generate non-ascii characters, such as PDFs or Word.
- Double quotes within a certain position in a field will cause that entire record to be skipped. To avoid any potential data integrity issues, the upload data integrity check will scan your file for any quotes and prompt you to remove quotes if any are detected.
- Ensure the Customer Code, Customer Name, Sector, and Subsector values in your file match those in the current customer list from CAMS NextGen or an error will be returned.
- Ensure the Subcategory, Section Number, and Service Type values in your billing files match exactly what you have successfully uploaded in your Service Catalog 2 file, or an error will be returned.
- Currency and Quantity fields may only contain the following characters: Numbers, negative sign, decimal. Do not include any other characters, such as dollar signs or comma separators.
- Ensure column headers conform to the fields as displayed in the data guidelines exactly or an error will be returned upon submission. Check for case sensitivity, or extra spaces at the end of a word.
- Date fields conform to a specific format and will return an error if not matched exactly. For example, Invoice date is mm/dd/yyyy so for July 2nd, 2024 you would need to include leading zeroes: 07/02/2024.
- Ensure your file does not contain BOM (Byte Order Marking), as it will fail the upload integrity check. If you encounter this error when uploading, You can check this by opening your <report>.txt file in notepad and checking the lower right corner.
If you notice anything containing 'BOM', simply open the 'file' menu in notepad, choose 'Save As', and then open the 'Encoding' drop down menu and select a different option (usually UTF-8).
- When combining data files, take extra care to keep delimiters intact to avoid validation error, and ensure that there are now blank rows or rows with a carriage return and/or line feed character at the end of the data. CAMS NextGen will compare record counts with the source data and analyzed data to ensure they match, and these situations may drive an error that row counts do not match.