

**CAPPS  
Financials User Group  
Thursday, July 27, 2017  
9 a.m. – 11 a.m.  
Travis Building, Room 1-100**

**Meeting Minutes**

<b>First &amp; Last Name</b>	<b>Email</b>	<b>Role/Position</b>	<b>Attend?</b>
Ai-Ching Reed	ai-ching.reed@tea.texas.gov	Texas Education Agency (TEA) - Financials (FIN) User Group (UG) Voting Member	Yes
Alison Williams	alison.williams@cpa.texas.gov	Comptroller of Public Accounts (CPA) – Communications, Change & Training	Yes
April Shapley	april.shapley@cpa.texas.gov	CPA	Yes
Bary Hobbs	bary.hobbs@hhsc.state.tx.us	Health and Human Services Commission (HHSC) – FIN UG Voting Member	Phone
Brian Roth	brian.roth@tcole.texas.gov	Texas Commission on Law Enforcement (TCOLE) – FIN UG Voting Member	Phone
Brian Wetzig	brian.wetzig@txdot.gov	Texas Department of Transportation (TxDOT) – FIN UG Voting Member	Phone
Carol Oberrender	carol.oberrender@sao.texas.gov	State Auditor’s Office (SAO) – Accountant	Yes
Chelsa Vinklarek	chelsa.vinklarek@cpa.texas.gov	CPA – Area Manager, Statewide Fiscal Systems	Yes
Cristal Martinez	cristal.martinez@sao.texas.gov	SAO	Yes
David Alonzo	david.alonzo@tea.texas.gov	TEA	Yes
Don Land	don.land@cpa.texas.gov	CPA – Budget & Internal Accounting	Yes
Eduardo Plaza	eduardo.plaza@tpwd.texas.gov	Texas Parks and Wildlife Department (TPWD)	Yes
Glynis Butruff	glynis.butruff@tdi.texas.gov	Texas Department of Insurance (TDI)	Yes
Joe Meyer	joe.meyer@tdi.state.tx.us	TDI – Project Manager; FIN UG Voting Member	Yes
Ken Ming	kenneth.i.ming@tjjd.gov	Texas Juvenile Justice Department (TJJD) – FIN UG Voting Member	Phone
Lawrence Cruz	lawrence.cruz@tvc.texas.gov	Texas Veterans Commission (TVC)	Yes
Melissa Luhan	melissa.luhan@txdot.gov	TxDOT	Yes
Morgan Frank	morgan.frank@rrc.state.tx.us	Railroad Commission (RRC)	Yes

First & Last Name	Email	Role/Position	Attend?
Nancy Clark	nancy.clark@tdi.texas.gov	TDI – Chief Financial Officer (CFO)	Yes
Oscar Robles	oscar.robles@twc.state.tx.us	Texas Workforce Commission (TWC)	Yes
Pete Marcell	peter.marcell@cpa.texas.gov	CPA – Project Manager (PM)	Yes
Rick Bishop	rick.bishop@cpa.texas.gov	CPA	Yes
Reggie Pegues	reggie.pegues@dir.texas.gov	Department of Information Resources (DIR) – Director of Accounting; FIN UG Voting Member	Phone
Sandy Williams	sandy.williams@rrc.state.tx.us	RRC – Director, Procurement/Contract	Yes
Sarah Evans	sarah.evans@rrc.texas.gov	RRC – Contract Specialist	Yes
Steve Schiurring	steve.schiurring@cpa.texas.gov	CPA – CAPPS Project Manager	Yes
Terry Wooten	terry.wooten@cpa.texas.gov	CPA – CAPPS Deployments; FIN UG Voting Member	Yes
Theresa Lopez	theresa.lopez@theccb.state.tx.us	Texas Higher Education Coordinating Board (THECB)	Yes

I. Welcome (Chelsa Vinklarek)

- Roll call for phone participants.
- Quorum confirmed.
- CAPPS will be unavailable beginning July 28 through July 31, 2017 due to cutover for the image upgrade.

II. Production Update: Financials Support Requests (SRs)

- SR Summary Documentation (Chelsa Vinklarek)
  - User Group members were provided with a summary of all active SRs on the HR/Payroll system.
  - There were 392 active SRs and 162 were considered high.
  - There are currently no critical SRs.
- SR Trend Report (Chelsa Vinklarek)
  - During this reporting period there were 111 SRs opened and 91 were closed.
- Governance Approved Enhancements (Terry Wooten)
  - A spreadsheet of Governance Approved SRs was provided. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.
    - SR 4646 – moved to *Pending Prod Migration*.
    - SR 4007 – moved to *Pending Prod Migration*.
    - SR 6665 – moved to *Complete*.
    - SR 6736 – moved to *Complete*.
    - SR 7519 – moved to *Acceptance Test*.
- Required Maintenance (Terry Wooten)
  - User Group members were provided a list of Required Maintenance SRs. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.

- SR 7645 – moved to *Acceptance Test*.
- SR 7936 – moved to *Acceptance Test*.

### III. CAPPs Reporting Approach (Rick Bishop)

- User Group members were provided with two documents for this topic: *CAPPs Reporting Approach* (Word document) and *CAPPs Reporting Approach Overview* (PowerPoint document).
- The Overview document (PPT) will be discussed in the Financials UG meeting today.
- The information in this document is not new: reports are requested in the Application Service Provider (ASP) Solution Center as always. SRs are analyzed by the CAPPs Production Team.
  - The Team will determine if there is an existing similar report already created.
  - Agency's data needs are considered and various tools are evaluated.
  - The Team works to determine if any other agency could benefit from this report. If the requested report will only benefit one agency that will be a different path.
- Reports are brought to User Group for a vote.
- Report types include:
  - Enterprise (standardized reports to be used by all agencies)
    - These reports are developed in Business Intelligence (BI) Publisher and requested in ASP. Agencies are instructed to look for these first.
    - All approved reports will be prioritized through the Governance process.
    - The reports will be developed and maintained by CPA.
    - Agencies will only see their own data.
    - These reports can be accessed via the dropdown menu in CAPPs.
  - Agency-specific reports
    - These reports fill a need or niche within an agency.
    - Business Objects/WEBi are easy to use and create reports with in BOBJ.
    - These reports are developed and maintained by individual agencies.
  - PeopleSoft queries
    - These reports are specific to each agency.
    - Each agency is responsible for creating the query through Query Manager or Query Viewer. Agency report writers are aware of these tools.
    - CPA can provide some training; however, YouTube is also a good resource for additional information.
    - These reports are developed by agency super users.
  - Data extracts
    - Note: this functionality will be part of a future enhancement.
    - The objective will be to develop a statewide data set and refresh it frequently.
    - Agencies will import this into their own reporting system.
    - Agencies have requested this tool to use with current systems they have.
    - The current timeline is TBD.
  - Oracle Business Intelligence (OBI)
    - OBI is used with CAPPs Recruit/Learn.
    - This tool is designed for canned reports or CPA can develop them for agencies to use.
  - Training

- CPA is developing Business Objects training materials.
- Agencies are also encouraged to view training videos for BO and/or Business Intelligence (BI) on YouTube.

#### IV. Fiscal Year End (FYE) Activities (Terry Wooten)

- The CAPPS Support Team provided new guidelines for archiving/purging records.
  - The records on the HX Recycle Table will be archived during the current year minus two Fiscal Years.
  - The records on the TX\_HX\_VW Table will be purged during the current year minus four Fiscal Years.
- Eighteen public queries will be moved to Production this weekend. Any issues identified will be worked as a high priority.
- WorkCenters are now available for agencies to test in UAT.
  - Agencies can access the WorkCenter document in ASP under SR 8614.

#### V. Modified Private Queries (Terry Wooten)

- Two tables will be replaced/retired as of July 31, 2017.
  - TX\_HX\_VW replaces TX\_INTF\_HX\_TBL.
  - TX\_BATCH\_INFO replaces TX\_INTF\_EXC\_RPT.
  - Reports and public queries have been modified to use the new tables.
- Any queries modified in FINRPT2 during UAT will be moved to Production during the cutover weekend beginning July 28 through July 30, 2017.
  - Modified public queries will move to Production with the Batch Rewrite.

#### VI. Project Update: Financials Deployment FY17 (Pete Marcell)

- Deploying agencies: COA 1- 14, CPRIT, OCFW, SCJC, TCCA, THECB, TSC, TSL and TSLAC.
- On track for go-live September 1, 2017.
- The “soft” go-live is on track for August 14, 2017.
- UAT is nearly complete and the UAT environment will remain available until September 4, 2017.
- The CAPPS Deployment Team is still working on reports.

#### VII. Miscellaneous