

CAPPS Financials  
**Enhancements (SRs) Submitted to User Group**  
1/26/2017

Service Requests (SR) Information											
SR #	Requesting Agency	Product	Impacts All Agencies	Module	Priority	Level of Effort	Short Description	Long Description	Synopsis of Request (Requirements)	Proposed Solution (How it would work/Customization Overview)	CAPPS Support Team's Vote Recommendation
<b>Voting Items</b>											
6736	CPA	CAPPS Reporting Team	Yes	Reports	Medium	Medium (estimated with 6665)	Recv Rpt-TXCPO003-Qty on assets is overstated	Line 1 is for a qty of 2; this line also happens to be an asset so there are 2 separate serial numbers and asset tag numbers assigned to these 2 items. When the Print Delivery Report button is used to generate a Receiving Report – (TXCPO003) – it displays line 1 twice – for quantity of 2 each time, making it appear that there is a total quantity of 4, when it is really only 2. The Po History portion of the report does correctly show the quantity as 2.	CPA users would like for report TXCPO003 to reflect the correct quantity in both sections of the report, when the item is an asset.	Modify TXCPO003 to print correct total quantity when line quantity > 1 for an asset.	Approve
6665	TJD	CAPPS Reporting Team	Yes	Reports	Low	Medium (estimated with 6736)	Recv Rpt-TXCPO003-Add extended cost	Add and extended cost to the receipt lines along with a grand total.	Currently the receiving report only tells you the unit price and how many were received. Users then have to perform the calculation manually to make sure that it is correct before pulling it into the voucher.	Add a calculation that multiplies Unit Cost by the quantity received and add it to the receipt line in the Receipt Details section. In addition add a grand total at the bottom that sums all receipt lines. .	Approve
7519	CAPPS	CAPPS Reporting Team	Yes	Reports	Medium	Small	Add inspection column Receipts Pending - Aging Rpt	The Texas State Library and Archives Commission requires that purchase orders cannot be paid unless the items have been received and inspected. In order to meet this requirement, an inspection column needs to be added to the report to show whether the items were inspected.	Receipts Pending-Aging report does not indicate whether inspection is required or has been completed.	Receipts Pending-Aging report; add an 'Inspection Required' column displaying 'Y' or 'N', and an 'Inspected' column displaying 'I' (inspection incomplete) or 'C' (inspection complete) so analyst can determine whether the PO can be paid.	Approve
7520	CAPPS	CAPPS Reporting Team	Yes	AP/Reports	Medium	Medium	Add Approver names and dates to Voucher Print	The Voucher Print prints a voucher to be filed with all supporting documentation for the payment. Agencies typically will sign the voucher print document as approval the the voucher is valid.	Agencies that are using AP Workflow would like the names of ALL approvers and dates it was approved to print in the Approver box instead of physically signing the form.	Add the Approver Name and Approval Date to each voucher.	Approve
6975	CPA	CAPPS Financials	Yes	Workflow	Medium	Small	Display the Req ID number along with the Req name when approving Requisitions using Workflow.	Both the Req ID number and the Req name should be displayed in both the "Confirmation" section and the "Review/Edit Approvers" section when approving Requisitions using Workflow.		Display the REQ Number to the right of the REQ Name when the requisition is in the approval process during workflow.	Approve
5124	CPA	CAPPS Financials	Yes	PO	Medium	Small	Auto-populate contract id on PO lines	CPA would like to request an automated way to populate the contract id number on all lines of a Purchase Order. Currently, the purchaser has to go to each line of a PO to add the contract number. One suggestion might be to look at the PO Defaults page to see if it could be modified to include the Contract Id number at the Line level.	Currently, the purchaser has to go to each line of a PO to add the contract number. Linking procurement to existing contracts where applicable is required by legislation (SB20).	Allow the end-user to have contract id default to all lines automatically by either selecting it as a PO default or method similar to the way PM/PCC copies down when entered on the first line of a PO.	Approve

Column Name	From ASP SC?	Description
SR #	Yes	The SR # assigned to this request by ASP SC.
Agency	Yes*	The Agency requesting the change. *In some cases an SR has been entered by CPA Help Desk on behalf of another agency.
CSR Product	Yes	High Level identifier of the Production Environment that will be affected. (Portal, Financials, Business Objects)
Impacts All Agencies	Yes	Indicates whether an SR will impact on the submitting agency or will impact more than one agency.
Module	Yes	The Module(s) this SR affects.
Priority	Yes	Priority of this request to the requestor.
Level of Effort	No	The Level of Effort the CAPPs maintenance team estimates it will take to build, test and implement this change into production. Includes both functional and technical hours. Please see Tab 4 for Levels of Effort.
Assigned To	Yes	The CAPPs Help Desk analyst who will manage the SR Ticket
FM Analyst Assigned	Yes	The Fiscal Management Analyst assigned to an SR Ticket that becomes a CSR for a system change and whose name will remain tied to the CSR through its resolution
Request Type	Yes	The type of request. Enhancement will be the most common for this form.
PS Case Number	Yes	The PeopleSoft Case Number or Business Objects Report Number.
Short Description	Yes	A short (50 Characters or less) description of the ticket request/problem.
Long Description	Yes	A detailed description of the ticket request/problem.
Created By	Yes	The name of the user who originated the SR Ticket
Created Date	Yes	The date the ticket is entered in the ASP SC system.
Date Requested by	Yes	Optional Info: The date the requestor would like the change completed.
Synopsis of Request	No	A rewrite of the problem/issue by the CAPPs Help Desk Analyst Assigned.
Proposed Solution	No	A brief description of the general approach that will be taken to complete this ticket.
Additional Documentation	Possibly	Any additional documentation that will help voting members understand the change request or issue being resolved.

<b>Level of Effort</b>	<b>Range of Hours</b>
Low	up to 60hrs
Medium	61 - 120hrs
High	121-240hrs
Project	over 240hrs

\* Level of Effort includes both Functional and Technical time.