## Conference Room Attendees

<table>
<thead>
<tr>
<th>First &amp; Last Name</th>
<th>Email</th>
<th>Role/Position</th>
<th>Initials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alison Williams</td>
<td><a href="mailto:alison.williams@cpa.texas.gov">alison.williams@cpa.texas.gov</a></td>
<td>Comptroller of Public Accounts (CPA) – Communications, Change &amp; Training</td>
<td>Yes</td>
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<tr>
<td>Anthony Martin</td>
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<td>Centralized Payroll &amp; Personnel System (CAPPS) Financials Production Support Supervisor</td>
<td>Yes</td>
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<td>State Auditor’s Office (SAO) – Accountant</td>
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<td>Yes</td>
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<td>SAO – Contract Manager</td>
<td>Yes</td>
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<td>CPA – Financials (FIN) User Group (UG) Voting Member</td>
<td>Yes</td>
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<tr>
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<td>Texas Department of Insurance (TDI) – Program Specialist</td>
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<td>Steve Schiuring</td>
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<tr>
<td>Terry Wooten</td>
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<td>CPA – CAPPS Deployments; FIN UG Voting Member</td>
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<tr>
<td>Thelma Garcia</td>
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<tr>
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<td>SAO – Contract Manager</td>
<td>Yes</td>
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*Note: attendee list does not reflect conference call attendees.*
I. Welcome (Tony Martin)
   • Roll call for phone participants.
   • Quorum confirmed.

II. Production Update: Financials Support Requests (SRs)
   • SR Summary Documentation (Tony Martin)
     o User Group members were provided with a summary of all active Service Requests (SRs) on the Financials System.
     o There were 428 active tickets in January; 189 of those were high.
   • SR Trend Report (Tony Martin)
     o 174 new SRs were opened in January; 138 SRs were closed.
     o The number of opened SRs is trending up due to increased requests for reconciliation reports.
   • Governance Approved SRs (Terry Wooten)
     o A spreadsheet of Governance Approved SRs was provided. Updates since the last meeting are identified with an asterisk (*) and bolded.
     o There are 16 SRs for review. This includes two months’ worth of voting SRs so there are several changes.
       ▪ SR 3030 – moved to System Test. The CAPP5 Support Team is conducting demonstrations with TDI. Functionality is now available for agencies to see.
       ▪ SR 5124 – moved to Assigned.
       ▪ SR 7519 – moved to Closed. The requesting agency determined this item was no longer needed. The Financials User Group re-voted to “reject” this SR on November 30, 2017 so it could be removed from consideration.
       ▪ The following SRs were newly approved by the Steering Committee at the February 1, 2018 vote and have been placed in Assigned status:
         ▪ SR 8834/8835 – ranked at #2 in priority.
         ▪ SR 8340 – ranked at #3 in priority.
         ▪ SR 9027
         ▪ SR 8145
         ▪ SR 6112/6784
         ▪ SR 7995
         ▪ SR 7794
         ▪ SR 9330
   • Required Maintenance (Terry Wooten)
     o User Group members were provided a list of Required Maintenance SRs. Updates since the last meeting are identified with an asterisk (*) and bolded.
       ▪ SR 10160 – new SR on list; in System Test. This is a new performance fix related to an older SR. SR 10160 corrects two misplaced validations that caused slow performance when entering large vouchers.
       ▪ SR 9458 – moved to System Test. This SR adds confidential indicators and configurable multi-purpose fields. Changes to these fields will not trigger/restart workflow so it should not impact payment processing time.
       ▪ SR 7604, SR 8849 and SR 8850 – the three SRs related to the Legislative Budget Board (LBB) Interface remain in Acceptance Test and are expected to migrate to Production pending a bug fix.
• SR 9437 and SR 9435 – these SRs are related to the PeopleSoft Image and PeopleTools upgrade. Both SRs moved to System Test. The CAPPS Support Team will provide an in-depth look at new functionality and User Acceptance Test (UAT) plan during the April User Group Meeting.

• An additional 14 SRs related to the FY18 deployment moved to System Test.

III. Production Update: Page and Navigation Changes (Terry Wooten)

• CAPPS is upgrading from Classic pages to Classic Plus pages with the Image 24 upgrade this summer.

• Most of the impacted Financials pages are used by the CAPPS Support Team and not CAPPS Production agencies, except for the Process Monitor page.
  o The changes to the Process Monitor page are minimal so the look of the page will be very similar to the current page.

• Due to the Image 24 upgrade, CAPPS is moving to unified navigation functionality which is the driving factor for a new order of menu items; the menu will no longer be in alphabetical order.
  o Navigation will only be accessible at the Portal level and not the lower levels.

• The blue buttons on the Portal page to access Financials and/or HR/Payroll will no longer be there after the upgrade. Users will directly navigate to the Financials and/or HR/Payroll page(s) they need to access based on their role/security.
  o Elastic Search can be utilized to quickly find a page.

• Current user favorites will no longer be available due to the menu change; old favorites must be re-saved after the upgrade under “My Links.”
  o The CAPPS Support Team recommends users take screen prints of their favorites so they can easily identify them after upgrade.
  o Users with access to Financials and HR/Payroll can save links for both applications in the new image.
  o Gray buttons to access Recruit and Learn will remain on the Portal because they are Taleo products and not Oracle.
  o UAT for the Image/Tools upgrade is scheduled to begin May 14 through June 29, 2018. Go-live is scheduled for July 9, 2018.

IV. Discussion Topic: High-Risk Configurations (Tony Martin)

• Due to ongoing issues causing significant work by the CAPPS Support Team, the Budget Definitions Page will be locked for agency users.
  o This decision is due to issues that occurred in February that caused the entire page to be rebuilt.
  o Agencies that need changes/updates will need to submit an SR.
  o The CAPPS Support Team will review the changes before they are migrated to Production.

V. Project Update: Financials Deployment FY18 (Steve Schiurring)

• Deploying Agencies: DPS, TSBP, TRS, TxRC, BON, TSD, TSSWCB, THC and TSPB.

• Go-live for deploying agencies is scheduled on September 1, 2018.

• Key Activities scheduled to occur in the next 30 days include:
  o Configuration Prototyping is 80% complete.
  o Build is 95% complete. Items that are completed are being system tested.
  o System Test Phase 2 is 42% completed with no major issues found.
• UAT for Production agencies is scheduled to occur from May 14 through June 29, 2018.
  o Testing will include the PeopleTools/Image upgrade as well as all enhancements from deployment. Financials, HR and Portal UAT are synced together because the PeopleTools/Image upgrade is happening at the same time for all applications.
  o The CAPPS Support Team recommends UAT testers focus on testing all of their routine, day-to-day business activities including running all reports to test functionality.
  o The CAPPS Support Team will demonstrate new functionality at the April User Group Meeting.
• Agencies expressed concern that image upgrades can impact functionality; the CAPPS Support Team is increasing the effort for System Test to mitigate the impact.

VI. Project Update: Business Objects (BO) 4.1 Upgrade (Steve Schiurring)
• BO 4.1 upgrade will go-live for Financials on May 29, 2018.
  o Version 3.1 will remain available until July 29, 2018.
• Agency testing begins April 2 and ends May 22, 2018.
• New features in the upgrade include:
  o Integration with CAPPS Security – CAPPS security roles will be based on current BO access. CAPPS User ID and Password will be used to access BO.
  o HTML replaces JAVA – system will run smoother and have a cleaner look and feel.
  o The CAPPS Support Team is currently testing all the public reports; these will be available for agency testing on April 2, 2018.
• BO 4.1 training will be provided at the end of the next Financials User Group Meeting on March 29, 2018.

VII. Closing/Action Items
• No action items were captured at this meeting.

VIII. Adjourn
• Next meeting is Thursday, March 29, 2018.