

CAPPS Financials User Group Meeting

Thursday, March 28, 2024

9–10:30 a.m.

(Webinar Only)

I. Welcome

- The meeting kicked off with an icebreaker question: “Marshmallow Peeps: Yes, or No?”
- 120 Attendees responded:
 - 73 percent answered “No way!”
 - 28 percent admitted that, “Yes! They're a guilty pleasure.”

II. Announcements and Reminders

- Business Objects (BOBJ) and PeopleSoft (CAPPS) upgrades are coming this summer.
 - BOBJ will upgrade from version 4.2 to 4.3, which provides a new user interface with improved methods for accessing and organizing reports.
 - Financials PeopleSoft will upgrade from image 40 to image 47.
 - Financials PeopleSoft will upgrade from image 41 to image 48.
 - The BOBJ team will present an overview and demonstration of version 4.3 at the **April 25** user group meeting.
 - A Focus Group session will take place during the **week of April 29**, reviewing the FIN Image Upgrade features.
 - The upgrades will be available for agency User Acceptance Testing (UAT) **May 6—June 14** and the images go live in Production on **June 24**.
- CPA offices (including the CAPPS Help Desk) will be closed on Friday, March 29 for an agency holiday. The office reopens on Monday, April 1 with normal business hours (8 a.m.—5 p.m.). The CAPPS environments remain available during this time.

III. Production Updates

- The Financials SR Data for February 2024 included 574 new tickets opened and 572 tickets closed. There were 336 tickets carried forward from February into March.
- The Financials release for March includes eight new requests that include two bug fixes, three features and three improvements. Highlights of these changes:
 - A bug fix to resolve a discrepancy between the Asset Summary and the Asset Listing Report so the transfer transactions are reconciled and properly included in both reports. (**SR 37973**)
 - An enhancement to include supplier and manufacturer item ID on the requisition print report. This report can be run from the Manage Requisitions page and the CAPPS Statewide Reports menu. (**SR 36757**)
- The Financials Release for April:
 - Financials Release 1 includes six requests that include three bug fixes and three new features. UAT for this release is April 1—5, with Deployment scheduled on April 11.
 - Financials Release 2 contains five requests that include three bug fixes and two improvements. UAT for this release is April 8—12, with Deployment scheduled on April 25.
 - Highlights from the April releases:
 - A bug fix to expand Alt-J functionality. This SR is discussed below in **Features and Spotlights**. (**SR 40407**)
 - A fix to the hyperlink for View Budget Journal Details. This link was not properly displaying the budget journal page for the entry type of transfer adjustment. (**SR 40416**)
 - A fix to ignore T-code 904/905 transactions during USAS Inbound processing and not update the USAS Process Status on the voucher line or header. (**SR 38774**)
- One enhancement is submitted for a vote to be added to the CAPPS Financials baseline:
 - **SR 39787** – Add Accounting date to search criteria.
 - *User Story: As a Cash Receipt User, I want the Accounting Date field added to the search criteria on the Add/Update Cash Receipts page so that I can search existing Cash Receipts based on the Accounting Date.*
 - Proposed Solution Summary: Add the Accounting Date field as a Search Criteria on the Add/Update Cash Receipt Page.

IV. CAPPS Project Updates

- The Image Upgrade to PeopleSoft Image 48 and PeopleTools 8.60 is progressing as expected.
 - Overall, the project is 68 percent complete.
 - Phase 2 System Test was recently completed.
 - Work on Phase 3 System Test has begun.
 - Upcoming Key Activities include:
 - Presentation and demonstration of BOBJ at the April 25 user group meeting.
 - A Focus Group will meet to review the changes and updates to CAPPS Financials in early May. Invitations will be sent within the next several days.
- Deployment for Employee Retirement System (ERS) and Texas Department of Criminal Justice (TDCJ) is progressing as expected. This deployment project follows an expanded timeline crossing over fiscal 2024 and fiscal 2025.
 - The project is in the Discovery phase, which kicked off in January and continues into the beginning of May.
 - Overall, the project is 3 percent complete.

V. On the Horizon

- Some system-generated emails triggered during the workflow are sent using the user's email address, rather than a system *No-Reply* email address.
 - These will be updated so system-generated emails are sent from the **CAPPS No-Reply** email address.
 - This configuration change will be implemented (separately from the regular release schedule) in UAT and migrate to Production in April. Updates will be communicated through **SR 41490**.

VI. Features and Spotlights

- A new feature enables a user to find out more information about a particular CAPPS page by invoking the **Alt-J** key combination.
 - When a user selects the **Alt** and **J** keys simultaneously, information about the current CAPPS page, component and menu displays.
 - Select the **Page Information** link to open a new tab that contains a **Show Attributes** button. Selecting **Show Attributes** displays all of the components on the page, including Record Name, Field Name and more.
 - To learn more about his feature, reference **SR 40407**.

VII. Open Forum/Q&A

- Asked attendees, *"Are you and your agency ready for User Testing for the Image Upgrade?"*
- Responses were collected via a multiple-choice poll in Slido. Those who responded said:
 - Thirty-nine percent indicated they are ready to begin UAT when it begins.
 - Twenty-eight percent replied that they were somewhat ready.
 - Thirty-four percent were not ready or were not aware of the image upgrade.
- As a refresher, image upgrades occur for CAPPS biannually. While Oracle frequently releases small updates to the PeopleSoft product, CAPPS combines these small updates into the biannual image upgrade. Refer to the **Announcements and Reminders** above for key dates related to this upgrade.

VIII. Deep Dives

- CAPPS Query Viewer is a reporting tool within CAPPS that allows users to execute pre-defined public queries or private (custom) queries that were shared with the user. Users can tag chosen queries as Favorites for easy access.
- CAPPS Query Manager is a reporting tool within CAPPS that includes the functionality of Query Viewer, plus it allows users to create new queries, modify existing queries and share queries with other users.
- Primary functionalities of Query Manager:
 - Search for existing queries by using a wildcard (%).
 - Add to favorites.
 - Use **Copy to User** to send a copy of the selected query to another user's private queries.
 - Use **Create New Query** to start a new query from scratch. The Query Manager Component opens with a tabbed interface. The following sequence outlines the typical steps to creating a report:
 - From the **Records** tab, locate the desired record then select **Add Record**.
 - From the **Query** tab, select the fields from the record to be displayed when the query is executed.
 - From the **Fields** tab, sort fields and set various field properties, including filtering criteria or prompting for criteria at the time of execution.

- From the **Query** tab, join related records to a query by selecting **Hierarchy Join**.
- From the **Records** tab, join unrelated records to a query by selecting an additional record and choosing **Join Record**. Any fields that are common to the records are automatically joined. Add additional joins from the **Criteria** tab.
- A **Save** button and **Save As** link are available on all of the Query Manager tabs, except the *Run* tab.
- CAPPS training team is working to include this desk aid on the [CAPPS Training](#) website.
- Refer to **SR 35436** for a desk aid that details all of the Query Manager functions and options.

IX. Wrap-up/Close Meeting

- **Next Meeting:** Thursday, April 25, 2024 — CAPPS HR/Payroll and Financials (Combined) User Group Meeting.
 - The BOBJ team will present an overview and preview demonstration of version 4.3.
- Submit ideas or suggestions for future user group discussion to: capps.product.team@cpa.texas.gov
- To be added to the distribution list for the user group meetings, email capps.cgc.ba@cpa.texas.gov