

CAPPS Financials User Group Meeting

Thursday, June 26, 2025

9–10:30 a.m.

(Webinar Only)

I. Announcements and Reminders

- User acceptance testing (UAT) for the PeopleTools upgrade continues through July 18.
 - The upgrade from version 8.60.10 to version 8.61.07 occurs on Aug. 4, 2025.
 - Testing takes place in the UAT3 environment.
 - Report issues in CAPPS Service Desk (CSD) as an *Upgrade & Expansion Project Assistance* Service Request.
 - For detailed information regarding what is changing with PeopleTools, refer to the **Features & Spotlights** discussion from the March 2025 Financials user group meeting.

Note: PeopleTools is the underlying technology platform for Oracle's PeopleSoft applications. It provides the tools and technologies for developing, customizing, and administering PeopleSoft applications, including Human Capital Management and Financials. PeopleTools enables tasks like application development, database management, security administration and system integration.

- A hard code freeze is in effect for July. During a hard code freeze, only emergency code migrations may be implemented. This prepares the system for the PeopleTools upgrade.
 - The code freeze occurs June 30 – Aug. 3, 2025.
 - Refresh of the lower environments is scheduled for the week of Aug. 4, 2025.
 - The scheduled release work will continue, with migration held until the week of Aug. 11, 2025.
- Enter a **Request Information, Service** or **Training** ticket in CSD if you require assistance with closing out fiscal 2025 budgets or setting up fiscal 2026 budgets in CAPPS.
- Review FMX's [Establishing Appropriations by Method of Finance, Rider, Capital Budget and Transfer Schedules \(FPP A.020\)](#) for additional guidance and information on timings for setting up budgets in CAPPS and USAS.

Note: Fiscal 2026 budget setups in CAPPS must be completed before Sept. 1, 2025, to ensure no interruptions in transaction processing.

II. CAPPS Financials Production Updates

- The Financials SR Data for May 2025 included 596 new tickets opened and 613 tickets closed. There were 375 tickets carried forward from May into June.
- The Financials release for June contains seven requests consisting of four break-fixes, one improvement and two new features. Highlights include:
 - **SR-64368** – A break fix to correct the voucher data in the *Contract Management* Report.
 - **SR-65187** – An improvement to the Voucher Build edits to require an ORIGINAL PAYMENT DATE for a PAYMENT TYPE of V (migration for this SR is June 26, 2025).
 - **SR-62964** – A feature to enable audits for the *PO Origin* table.
- The Financials release for August contains 14 requests consisting of nine break-fixes, three improvements and two new features.
- For the new Financials functionality being implemented in the August releases, two changes are highlighted for agency testing during UAT. Functionality and acceptance criteria:
 - **SR-65712**
 - **User Story:** *As a voucher approver, I want to search by a variety of entered by names entered on the **Mass Voucher Approval** page, including names that contain apostrophes, so that all vouchers entered by the specified individual that require my approval are returned in the search results.*
 - **UAT:** June 30 – July 11. Testers should validate that all applicable vouchers should be returned successfully in the search results of the **Mass Voucher Approval** page, regardless of the number of apostrophes contained in the name that is entered into the ENTERED BY NAME search field.
 - **Migration to Production:** Aug. 14.

- **SR-65825**
 - **User Story:** *As a Purchasing user, I want to prevent saving a receipt with an existing Asset ID when **Do Not Allow Multiple Receipts** is checked on the Asset class configuration page, so that a duplicate asset ID is not used for serialized assets.*
 - **UAT:** June 30 – July 11. Testers should validate that the system:
 - Uses the latest effective-dated, active asset class record.
 - Correctly maps the `PROFILE ID` to the corresponding `ASSET CLASS`.
 - Checks that the `ASSET ID` already exists within the same `BUSINESS UNIT` and `ASSET CLASS`.
 - Only displays an error message when the `ASSET ID` exists in the same `BUSINESS UNIT` and `ASSET CLASS` and the `ASSET CLASS` is configured with **Do Not Allow Multiple Receipts**.
 - **Migration to Production:** Aug. 14.
- One enhancement is submitted for a vote to be added to the CAPPs Financials baseline. The SR and the title from CSD (along with the user story and proposed solution) are listed below. For complete details, review the SR within CSD. Agencies are encouraged to add comments to the SR for consideration by the CAPPs Steering Committee before the July Steering Committee meeting.
 - **SR-66621** – Create a DB audit to display PO Status History (suggested via **ENH-65602**).
 - **User Story:** *As a procurement analyst, I need to be able to see the entire status history of POs so that I can determine whether user actions were appropriate and timely or if additional user training is required.*
 - **Proposed Solution Summary:** Create a table that gets added to the query security. Anyone who has **Query Viewer/Query Manager** access is able to run it.

III. CAPPs Project Updates

- The Financials deployment for ERS is currently 88 percent complete, with all metrics on track for implementation on Sept. 1, 2025. Key activities include:
 - Completed Train-the-Trainer sessions.
 - Completed system test.
 - Continue the PeopleTools upgrade review.
 - Continue UAT through July 18, 2025.
- Due to the size and complexity of Texas Department of Criminal Justice’s (TDCJ) financial operations, the Comptroller’s office and TDCJ have mutually agreed to extend their Financials “go-live” date to Sept. 1, 2026.

IV. On the Horizon

- CAPPs Training will offer a virtual instructor-led training (VILT) online *Asset Management* course.
 - A pilot session of the course was delivered on **June 18**.
 - Based on feedback from the pilot session, we are preparing final modifications to the course.
 - The first delivery of the VILT course will occur in early **August** with registration expected to open on the CAPPs [Instructor-Led Training](#) page in **July**.

V. Features & Spotlights

- Governor Greg Abbott issued *Executive Order GA-48* on Nov. 19, 2024, relating to the hardening of state government.
- All state agencies controlled by gubernatorially-appointed heads and all public institutions of higher education must:
 - Require any company that submits a bid or proposal concerning a contract for goods or services to the agency or institution to certify that the company and (if applicable) any of its holding companies or subsidiaries are not listed or owned by a government that is a foreign adversary.
 - Not enter into a new contract, contract extension or contract renewal for a good or service with any company that meets any of the above-listed criteria.
 - Certify compliance is required starting **Aug. 1, 2025**.

Note: Work with your agency’s internal legal staff and management to verify your agency’s specific requirements and process for implementing this order.

- Review the official [Executive Order GA-48](#) for other requirements and notes.

- Fulfill this requirement — suggested options within CAPPS include:
 - Adding a STANDARD COMMENT within the **Purchasing** Module.
Download the [Adding or Editing Standard Comments](#) Desk Aid from the CAPPS Training website for detailed information.
 - Enter HEADER and LINE COMMENTS with or without attachments. By default, these copy into the purchase order with the requisition.
Download the [Entering Purchase Requisitions](#) Desk Aid from the CAPPS Training website for detailed information.

VI. Open Forum Q&A

- We received a request to present a series of Deep Dive that follow a requisition through the Asset Management process.
- Each month, we release an *Ask Us Anything* survey where user group members may submit questions or suggestions for discussion topics. Members can find the survey link in the calendar invitation for the meeting as well as on FMX's CAPPS User Group Meeting pages. We encourage all members to submit questions and suggestions.

VII. Wrap-up/Close Meeting

- In July, individual user group meetings will be held for each tower:
 - **Financials User Group Meeting** — Thursday, July 24
 - **HR/Payroll User Group Meeting** — Tuesday, July 29
- 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