Agency ERP Project Request

SEC. 1

Agency name	Agency number

Contact Information

SECTION 2

Contact name	Title	Phone *(Area code and number)*
Street address		Email address
City	State	ZIP code

Request Type

SEC. 3

Select only one request type. A new request form (Form 74-222) is required for each request type.

☐ Join CAPPS ☐ New system ☐ New module ☐ Change in software version ☐ Any other change costing over $500,000

Software *(Select all that apply)*

SECTION 4

EXISTING SOFTWARE AND VERSION (V) NUMBER

☐ Lawson - M3
V: _____

☐ Oracle - eBusiness Suite
V: _____

☐ Oracle - PeopleSoft
V: _____

☐ Other _____
V: _____

☐ Sage - MIP
V: _____

☐ SAP - ERP
V: _____

☐ Sungard - Banner
V: _____

☐ Comptroller System (USAS, USPS, SPRS or CAPPS)

NEW SOFTWARE AND VERSION (V) NUMBER

☐ Lawson - M3
V: _____

☐ Oracle - eBusiness Suite
V: _____

☐ Oracle - PeopleSoft
V: _____

☐ Other _____
V: _____

☐ Sage - MIP
V: _____

☐ SAP - ERP
V: _____

☐ Sungard - Banner
V: _____

☐ CAPPS - Central
V: 9.2

☐ CAPPS - Hub
V: 9.2

Current Modules in Use *(Select all that apply)*

SECTION 5

IN-HOUSE	HOSTED		IN-HOUSE	HOSTED		IN-HOUSE	HOSTED	
☐	☐	General Ledger	☐	☐	Inventory	☐	☐	Human Resources
☐	☐	Budgeting	☐	☐	Payroll	☐	☐	Time and Labor
☐	☐	Billing	☐	☐	Procurement	☐	☐	Position Management
☐	☐	Grants	☐	☐	Accounts Receivable	☐	☐	Recruiting
☐	☐	Customer Contracts	☐	☐	Asset Management	☐	☐	Performance Management
☐	☐	Accounts Payable	☐	☐	Project Costing	☐	☐	Learning Management

New Modules in Scope of Request *(Select all that apply)*

SECTION 6

IN-HOUSE	HOSTED		IN-HOUSE	HOSTED		IN-HOUSE	HOSTED	
☐	☐	General Ledger	☐	☐	Inventory	☐	☐	Human Resources
☐	☐	Budgeting	☐	☐	Payroll	☐	☐	Time and Labor
☐	☐	Billing	☐	☐	Procurement	☐	☐	Position Management
☐	☐	Grants	☐	☐	Accounts Receivable	☐	☐	Recruiting
☐	☐	Customer Contracts	☐	☐	Asset Management	☐	☐	Performance Management
☐	☐	Accounts Payable	☐	☐	Project Costing	☐	☐	Learning Management

Estimated Project Cost

SEC. 7

Estimated project implementation cost .... $ _____   Estimated annual maintenance/support cost ....$_____

Project Time Frame

SEC. 8

Estimated start date	Estimated end date

In addition to this form submission, send documentation on your project justification via email to CAPPS.product.team@cpa.texas.gov and include references to any statutory requirements, audit findings, or agency initiatives.

Agency ERP Project Request Instructions

SECTION 1 — **Agency Name**

Enter the requesting agency name and number.

SECTION 2 — **Contact Information**

Provide the requested contact information for the agency-designated subject matter expert (SME).

SECTION 3 — **Request Type**

Select only one request type. A new request form (Form 74-222) is required for each request type. Below is a listing of choices with accompanying definitions.

Join CAPPS – Select this option if your agency is requesting approval to implement CAPPS for HR/Payroll, Financials, or both towers.

New System – Select this option if your agency is requesting approval to implement a new ERP system other than CAPPS or automate a manual system. This includes moving from one ERP system to another.

New Module – Select this option if your agency is requesting approval to implement a module from an existing ERP system.

Change in Software Version – Select this option if your agency is requesting approval to perform an upgrade. An upgrade is defined as a software change that results in change of version. *NOTE: This does not apply to version changes due only to a fix. If a fix is bundled with additional functionality, select this option.*

Any Other Change Costing More than $500,000 – Select this option if your agency is requesting approval to implement a change that exceeds $500,000 in cost that does not fall under one of the previous categories. This selection does not apply if the change is bundled with new functionality. If the change is bundled with new functionality select "Change in Software Version."

SECTION 4 — **Software** *(Select all that apply)*

Existing Software Name and Version (V) Number – Select the name(s) from the list of ERP software products currently in use by the agency and include the software version number. If existing products are not listed, please select "Other" and enter the software product name and version number.

New Software Name – Select the name(s) from the list of ERP software products to be implemented by the agency and include the software version number. If the new products are not listed, please select "Other" and enter the software product name and version number.

SECTION 5 — **Current Modules in Use** *(Select all that apply)*

Based on the existing software selection above, select all ERP modules the agency currently has or uses and indicate whether the module is maintained in-house or hosted by an external service provider.

SECTION 6 — **New Modules in Scope of Request** *(Select all that apply)*

Based on the new software selection above, select all modules the agency plans to implement or change and indicate whether the module will be maintained in-house or hosted by an external service provider.

SECTION 7 — **Estimated Project Costs**

High-level cost estimates are required to show project magnitude and anticipated on-going maintenance/support costs.

Estimated Project Implementation Cost – Provide the total estimated project implementation cost, which may include costs for hardware, software, services, contracted staff, in-house staff, and any other costs associated with the project implementation.

Estimated Annual Maintenance/Support Cost – Provide the total estimated annual maintenance cost, which may include costs for hardware, software, services, contracted staff, in-house staff, and any other costs associated with post-implementation maintenance/support.

SECTION 8 — **Project Time Frame**

Estimated Start Date – Enter a project start date. In the field with start date, define start date. For example: Start date is when the Business Case will be started.

Estimated End Date – Enter project end date. In the field with the start date, define end date. For example: End date is when the product is delivered and signed off on.