

CAPPS HR/Payroll
 Governance Approved Enhancements
 Date of Report: 10/19/2018

Service/Support Request (SR) Information: Enhancements (SRs) Approved by Governance – Active

Governance Priority	SR #	Gov Priority #	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)	Status; *Updates	Status Notes (additional Status information); *Updates
1	2751	39.4	DPS		Yes	TL Time and Labor	Low	Medium	Holiday Comp expired report	Would it be possible to create a canned report for Super Users to display holiday comp expired under Texas Reports?	The Comp Time Expiration Report (HTL00018) shows expiration hours and dates for regular comp time. Agency would like the report to be modified to include expiration hours and dates for holiday comp time.	Modify the existing Comp Time Expiration Report by inserting a column to show whether the comp type to be expired is regular comp or holiday comp time.	Assigned	Pending Development
2	435	39	DMV		Yes	Reports	High	Medium	Active Position Report Enhancements	Requesting the PCA, EEO and state job code, instead of functional job code, as well as title be added. The PCA, EEO and functional title have been added as part of the 2016 deployment activities.	Additional fields requested to make it like USPS 508 Report.	As part of the 2016 deployment activities the PCA, EEO and functional title were added. We did not alter the functional job code to state job code. The USPS 508 report had 2 job code fields; the state job code is part of the functional job code in CAPPS. There is no job title on the 508 report, however we did add the functional title to the CAPPS report. As this is a report and not a query run in Excel, there is no more real estate to add a state title, but we could replace the functional title if that's what users want.	*Governance	This was previously approved by governance on 9/12/2017. However, as we now have many unclassified agencies on board, the state class code and title will not work for everyone.
3	3023	34.2	DPS		Yes	TL Time and Labor	Low	Medium	Super User Comp Balance by Employee Report	Would it be possible to have the TX_TL_COMP_BAL_BY_EE Comp Day Balance by Employee report moved to the Super User Texas Reports section to allow Super Users to run this report through their Row Security Permission?	Agency cannot give all superusers access to Query Manager and they need access to the TX_TL_COMP_BAL_BY_EE Query.	Create a new report based on field gathered from user requirements. The TX_TL_COMP_BAL_BY_EE query provides the data for the Comp Balances by Employee Rpt that already exists in CAPPS, but not available to users. The current HCTL1027 can be modified to be available to CAPPS users.	Assigned	Assigned to the CAPPS Reporting Team
4	7600	31.83	DPS	CAPPS HR/Payroll	Yes	Performance Management	Medium	Medium	Query Needed to display Performance Notes	Recreated from SR 6755 and 7460. We would like a query created for Performance Notes. We require the following Performance Notes fields displayed: Empl ID, Employee Name, Reports To Empl ID & Name, Created By Name and Date/Time, Subject Line, Note, Transferred By Empl ID & Name, Transferred To Empl ID & Name, Updated By Name and Last Updated Date/Time.	In order to efficiently and effectively manage information captured in the Performance Notes a query is needed	Develop a new query which will display the following fields: <ul style="list-style-type: none"> • Emplid • Employee Name • Reports To Name • Reports To Emplid • Created by Name • Created Date/Time • Subject • Note • Transferred by Name • Transferred by Emplid • Transferred to Name • Transferred to Emplid • Updated by Name • Last Updated Date/Time Prompts will include: Company (required) Department (optional) Manager's Name (optional)	Assigned	
5	2497	31.8	DPS		Yes	TL Time and Labor	Low	Medium	Super User Time Needing Approval Report	Would it be possible to create a canned report for Super Users to see time in 'NA' status under their 'Texas Reports'?	Agency cannot give all superusers access to Query Manager and they need access to the Time Need Approval Query.	Create a new report for needs approval time for Super Users.	Assigned	Pending Development

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6	7156	31.20	CPA	Talent Management	Yes	Reports, Recruiting	Medium	Low	Request Permanent Cng to Can History Detail RPT	<p>We are requesting to submit a ticket to produce the Candidate History Details Report from CAPPs Recruit that will also include a time stamp of when the candidate submitted their application. Doug mentioned he can assist in adding the Time Stamp. We would like these changes to be approved through governance and applied to the production report. In addition to the above, a separate ticket of the report above to include a permanent field in the report to include the Time Stamp so that that the staffing rep can run the report at any given time as this will be a regular occurrence.</p> <p>Many thanks, Matt Martinez Team Lead – HR Operations & Staffing Texas Comptroller of Public Accounts 111 E. 17th St., LBJ Bldg. Ste 124 Austin, Texas 78774 Phone: (512) 936-4143</p>	Add the Time portion of the date-time stamp for the Submissions Completed date field on the Candidate History Details report and the Application Screen - Interview Summary report. Agencies can see which requisition a candidate applied to first if there are submissions across multiple job requisitions.	Update the e Candidate History Details report and the Application Screen - Interview Summary report to include the Time portion of the time-date stamp for Submissions Completed date field.	*Pending Prod Approval	
7	5046	29.6	DPS		Yes	Reports	Low	Low	Create new OT Balance Query	Agency would like new query to track OT balances with an 'as of' date.	Creating query would help agencies track OT balances. This is particularly helpful for commissioned officers due to new legislation, but not limited to CO's.	Query to show BANKEDOVRT end balance for any employee with OT on requested date.	Assigned	Pending Development Assigned to the CAPPs Reporting Team
8	6188	28.33	DMV	Talent Management	Yes	Reports, Recruiting	High	Medium	RECRUIT - Applicant Withdrew	<p>Contact: Pat Barnes - 512-465-4014</p> <p>Why are applicants that have withdrawn their application for a requisition, on the applicant report that we send supervisors? JR xxxx has an applicant xxxxxx xxxxxxxx #xxxx on the Oracle Business Intelligence - Applicant Screen Interview Summary report that I ran for the supervisor that lists all applicants, but she withdrew her application before the requisition closed. The manager cannot see her application, but her information show up on the report</p>	The request is to exclude withdrawn candidates from the CAPPs Recruit OBI Report entitled Applicant Screen - Interview Summary Report.	Modify the Applicant Screen - Interview Summary Report Prompts to add prompts as necessary for the step and status, and as a default, exclude withdrawn candidates from the report. This will exclude withdrawn candidates as a default, but also will allow for the withdrawn candidates to be added in when running the report online via OBI if desired.	*Pending Prod Approval	<p>Recommend adding a filter to the report for "Submission CSW Status - Current"."Current Status Name", and also adding this to the prompt file, and to default the prompt to be:</p> <ul style="list-style-type: none"> - Operator = "is not equal to / is notin", - and the values to not include = "Applicant Withdrew", "HasDeclined", "Refused", and possibly also "Not Selected", - but let the User change the filter, and the filter does not need to be mandatory. <p>We will start the FDD for this change the week of 08/27/2018.</p>

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9	7972	28.17	DPS	CAPPS HR/Payroll	Yes	Performance Management, Security	Medium	Low	Modify Permission List for TX_EP_AGENCY_ADMIN role	<p>1. The Maintain Performance Notes functionality is currently only available to Managers and is not available to Agency Administrators. The information contained in Performance Notes is subject to disclosure in the event of an Open Records request under the Publish Information Act. In order to comply with any such requests and monitor the information included additional agency access to this information is required (requested by DPS in SR 6753).</p> <p>2. The Development Documents menu is available as an option for Agency Performance Management Administrators however this is not functionality that is used in CAPPS. Having the menu available may cause confusion.</p>	<p>1. Make the Maintain Performance Notes functionality available Agency Performance Management Administrators in addition to Managers (requested by DPS in SR6753).</p> <p>2. Remove access to the DevelopmentDocuments menu as this is not functionality used in CAPPS. Having the menu available may cause confusion.</p>	<p>Modify the Permission List for the TX_EP_AGENCY_ADMIN role so that individuals with that role:</p> <p>1. May View, Update, Delete and Transfer Performance Notes</p> <p>2. To not include access to the menu item for Development Documents</p>	*In Work	Assigned to Security Team.
10	6538	27.60	DPS	Performance Management	Yes	Performance Management	Medium	Medium	Request at least one comment box to be required	We would like to request for the overall comment box under core competencies to be required under the 'Complete Manager Evaluation' step, before an eval may be shared with the employee.	Based on agency policy managers are required to enter a comment for an employee's core competencies.	If an Agency elects to include this enhancement into their agency specific template(s), then the new 'Section' i.e. "Mandatory Comments" will be included into their template. This new 'Section' will be configured to display only during the "Complete Manager Evaluation" step. The comment field associated with this new section will require the manger to enter a comment.	*Pending Prod Approval	This was approved by NT CAB and moved into development.
11	5005	26.20	CAPPS	Performance Management	Yes	Performance Management	Low	High	New Query to list Comments During EP Eval review	The agency needs a query that allows them to see a list of all evaluation documents that contain comments entered in various locations. The comments may be entered in: item, section and/or summary. The comments can be entered by several roles: the manager, 2nd level manger, the employee. The employee comments can also be from the employee's self evaluation or comments from an employee participating as a peer review. The document creation list should have the capability to sort/filter by agency, business unit, department, individual employee, or dates.	Create query to list comments made by Employees, Peer/Participant or Managers during the performance evaluations at various statuses. If there is a comment, populate the results, disregard results, if null.	<p>Develop a new query that will include the following fields:</p> <ul style="list-style-type: none"> • Company (Agency Number) • Department • Department Set ID • Document ID • Employee's Name (First name and Last name) • Name (Author's Name) • Role Type (Manager, Employee, Peer) • Reviewer ID (EMPLID) • Section Title • Section Comments • Item Title • Item Comments • Updated By • Last Update Date/Time <p>Include Required prompts for: Department, Manager's Name, Empl ID, Role Type (Manager, Employee, Peer) , Optional Prompts for: Section Title, Item Title.</p>	*In Work	<p>Submitted new FDD and walk through scheduled 10-8-18.</p> <p>FM increased the priority level, due to the increasing number of agencies, and the increase number of request for this data.</p>

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12	7974	24.83	CAPPS	CAPPS HR/Payroll	Yes	Performance Management, Security	Medium	Low	Modify mgrs' ability to delete/cancel Perf Docs	Various agencies have expressed concerns and raised questions related to a manager's ability to cancel and/or delete performance documents with no means to restore the document. Develop a method to limit the manager's ability to delete and cancel documents while still allowing them the flexibility to appropriately manage their employees' performance documents.	Currently, a manager can both cancel and delete performance documents and there is no way to restore the documents. Agencies are requesting a better method to manage the deletion and cancellation of existing performance documents.	<p>1. Modify the TX_SS_MANAGER_EPM role so that it no longer includes access to the Delete Documents page.</p> <p>2. Add a new content item to statewide templates in the Document Purpose section called 'Cancellation Justification'. This content item would include 5 pre-defined reasons for the manager to indicate why the document needs to be cancelled.</p> <p>The information recorded in the content item will be included in the results of the document with ratings query. Agency Administrations would then take the appropriate action based on the manager's input.</p> <p><i>Note: For agencies with specific templates an ASP ticket can be submitted to add this to their agency-specific template.</i></p>	Assigned	Assigned to Security Team.
13	1111	23.17	OCA/SPA		Yes	Reports	Medium	Large	State Matching Contributions Reports by Year	Agency would like the current State Matching Contribution Report to include the Appropriations Year (AY) column. The TX_PYRL_DTL should include earn and pay dates, as well as the AY and FY for each. Additionally, they would like a new report for YTD contribution totals with the option to run by either FY or AY. The current report only has the option to run by payroll document number.	The Agency would like to add the EARNES_END_DT field to the State Matching Contribution Report to show when an amount was appropriated versus when it was paid. Additionally, they are requesting a new report in the same format as the State Matching Contribution Report with a Run Control option of FY or AY. Adding the Run Control option for FY or AY cannot be simply added to the current report.	Add the AY to the current State Matching Contribution Report. Create a new report that provides year-to-date totals with the option to run by either FY or AY. Add the earn date and pay date to the TX_PYRL_DTL query along with the corresponding AY and FY columns.	Assigned	Pending Development Assigned to the CAPPS Reporting Team
14	7561	22.17	DPS	CAPPS HR/Payroll	Yes	Performance Management	Low	Low	Add Document ID field to Agency Admin pages	We would like to request that the document id number be added on all the Administrator's search pages and/or maybe have it added as a search criteria. We have an instance where a Manager is needing to reopen a cancelled document, however, as an Administrator we cannot tell which document to reopen because they have the same exact period dates. Screenshot attached.	Currently, the fields available to the Agency Performance Management Administrators allow searching by: <ul style="list-style-type: none"> Name Manager's Name Period Dates Emplid If multiple documents exists that meet the same search criteria Administrators may take action on the incorrect document.	Make Doc ID an available search field on the following Performance Management Agency Administrator pages: <ul style="list-style-type: none"> View Documents Transfer Documents Reopen Documents Cancel Documents Delete Documents 	*In Work	FDD updated
15	3383	21.67	DPS		Yes	Reports	Medium	Medium	Add items to the TX_HR_AGY_NEW_HIRES_TRNSFRS query	We would like Hazardous duty related items to be added to the New Hire and Transfers Report. This will also be beneficial for current and future agencies who have commissioned employees. As well as the retiree indicator.	Add fields to New Hire and Transfers query to include fields used by law enforcement employees (haz duty, badge type, etc.).	Add additional fields to the query.	Rework	Pending Development Assigned to the CAPPS Reporting Team
16	4138	20.4	DPS		Yes	Reports	Medium	Low	New query for PCA Map for Deductions	We have several benefit mapping discrepancies dating back to initial budget load prior to CAPPS go-live, and I am in need of a report/query that lists all of our benefit and tax mapping for each fund. I have done a fairly exhaustive search in Query Manager and am in need of assistance to determine if there is an existing query that will provide me with this information.	Currently users have to individually look up information in the TX Fringe Redistribution mapping page to research items.	Creating a query would allow users to view all of their mapping items at once.	Assigned	Pending Development Assigned to the CAPPS Reporting Team

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17	7973	18.50	DPS	CAPPS HR/Payroll	Yes	Performance Management, Security	Medium	Low	Create new security role TX_EP_OPEN_RECORDS_ADMIN	Certain information included in Performance Documents is subject to disclosure in the event of an Open Records request under the Public Information Act. Create a new security role to allow an agency to provide designated staff with view only access to the required Performance Management related information. This ticket is created to cover functionality requests from SRs 6753, 6999 and 6756	Agencies are required to provide information in a timely manner in response to requests under the Public Information Act. Providing agencies the ability to designate the person responsible for responding to these requests allows for more efficient response times.	<p>Create a new security role that includes View access to all of the following:</p> <ul style="list-style-type: none"> Maintain Performance Notes Define Criteria Status View Documents Approve Documents <p><i>Note: If the same individual is granted both the TX_EP_AGENCY_ADMIN role and the TX_EP_OPEN_RECORDS_ADMIN role, where there is overlap, the update access granted with the TX_EP_AGENCY_ADMIN supercedes the View access granted with the TX_EP_OPEN_RECORDS_ADMIN role</i></p>	*In Work	The Agency Admin access to view the employee document details in the Define Criteria step, are in progress, waiting to migrate enhancement into UAT for agency testing. The remaining creation of the Open records role is also in progress by CAPPS Security team.
18	4058	17.6	DPS		Yes	Reports	Medium	Low	New query for PCA Map for Taxes	We have several benefit mapping discrepancies dating back to initial budget load prior to CAPPS go-live, and I am in need of a report/query that lists all of our benefit and tax mapping for each fund. I have done a fairly exhaustive search in Query Manager and am in need of assistance to determine if there is an existing query that will provide me with this information.	Currently users have to individually look up information in the TX Fringe Redistribution mapping page to research items.	Creating a query would allow users to view all of their mapping items at once.	Assigned	Pending Development Assigned to the CAPPS Reporting Team
19	6571	17.17	DPS	CAPPS HR/Payroll	No	Reports	Low	Medium	Employee Biosketch Report update Run Control	Would the CPA be able to run an Employee Biosketch Report for all employees in our entire agency and provide it to us? Currently, the Employee Biosketch report process in CAPPS only allows by employee, we unable to run it by department or agency.	Currently the Run Control allows users to run report by employee, allowing for multi-employee selection. The Run Control can be modified to allow more options for running the report.	Modify the Run Control for the Bio-sketch report to allow the report to be run by a single department.	Assigned	Pending Development Assigned to the CAPPS Reporting Team
20	2374	12	DPS		Yes	TL Time and Labor	Low	Small	No Success Time Administrations Report	Would it be possible to have the query copied over to us that shows the employees with "No Success" runs in Time Administration that way we can run it periodically to have them cleared out?	Agency requests the creation of a new query to show the employees with "No Success" runs in Time Administration. Currently, CPA runs a query, and distributes it to the agency. Agency would like the ability to run the query.	Develop a new, public query using the SQL CPA has already established.	Assigned	Pending Development Assigned to the CAPPS Reporting Team