Centralized Accounting and Payroll/Personnel System (CAPPS)
HR/Payroll User Group
March 27, 2018
9:00 a.m. – 11:00 a.m.
Travis Building – Room 1-100

Meeting Minutes

Conference Room Attendees*

First & Last Name	Email	Role/Position	Attended?
Alba Nieves	alba.nieves@tpwd.texas.gov	Texas Parks and Wildlife Department (TPWD)	Yes
Alice Alvarado	alice.alvarado@cpa.texas.gov	Comptroller of Public Accounts (CPA) – Division Manager, Statewide Fiscal Systems	Phone
Alison Williams	alison.williams@cpa.texas.gov	CPA – Communications, Change & Training	Yes
Amy Petrick	amy.petrick@dps.texas.gov	Department of Public Safety (DPS) – HR	Yes
Amy Ramos	amy.ramos@cpa.texas.gov	CPA – Payroll; HR/Payroll (HR) User Group (UG) Voting Member	Yes
Anastacia Rodriquez	anastacia.rodriquez@tdhca.state.tx.us	Texas Department of Housing and Community Affairs (TDHCA) – HR	Yes
Andrea Smith	andrea.smith@cpa.texas.gov	CPA-CAPPS HR Production Supervisor	Yes
Angela Kemp	Angela.kemp@dps.texas.gov	DPS – HR	Yes
Annessia Belew	Annessia.belew@dps.texas.gov	DPS – HR	Yes
Brad Ringo	brad.ringo@tpwd.texas.gov	TPWD	Yes
Chelsa Vinklarek	chelsa.vinklarek@cpa.texas.gov	CPA – Area Manager, Statewide Fiscal Systems	Yes
Cherish McKemie	cherish.mckemie@dps.texas.gov	DPS - HR	Yes
Cynthia Rivera	cynthia.rivera@thecb.state.tx.us	Texas Higher Education Coordinating Board (THECB)	Yes
Dean David	dean.david@tpwd.texas.gov	TPWD – Business Analyst	Yes
Donna Clay	donna.clay@cpa.texas.gov	CPA – HR/Payroll Domain Lead	Yes
Eduardo Plaza	eduardo.plaza@tpwd.texas.gov	TPWD – PM	Yes
Ivan Mazoch	ivan.mazoch@cpa.texas.gov	CPA – IT	Yes

First & Last Name	Email	Role/Position	Attended?
James Keyser	james.keyser@tea.texas.gov	Texas Education Agency (TEA) – Payroll	Yes
Jenell Paul	Jenell.Paul@hhsc.state.tx.us	Health and Human Services Commission (HHSC) – Learning Resource Network	Phone
Kathryn Crabtree	kathryn.crabtree@scjc.texas.gov	State Commission on Jucidial Conduct (SCJC) – Staff Services Officer	Yes
Kathryn Dolan	kathryn.dolan@rrc.texas.com	Railroad Commission (RRC) – HR	Yes
Kathy Cortez	kathy.cortez@tea.texas.gov	TEA	Yes
Lakshmy Haridas	lakshmy.haridas@thecb.state.tx.us	THECB – HR	Yes
Leonard Higgins	leonard.higgins@cpa.texas.gov	CPA	Yes
Lisa Jammer	lisa.jammer@dir.texas.gov	Department of Information Resources (DIR) – HR Director	Phone
Lourdes Solis	lourdes.solis@tea.texas.gov	TEA – Payroll	Yes
Mark Johannsen	mark.johannson@hhsc.state.tx.us	HHSC – IT Oversight	Yes
Martha Reesing	Martha.Reesing@tea.texas.gov	TEA	Yes
Michele Cook	michele.cook@tea.texas.gov	TEA	Yes
Paige Steen	Paige.Steen@dps.texas.gov	DPS	Phone
Rick Bishop	rick.bishop@cpa.texas.gov	CPA	Yes
Rusty Charlton	russell.charlton@cpa.texas.gov	CPA – CAPPS Project Manager	Yes
Sandra Woodruff	sandra.woodruff@cpa.texas.gov	CPA – Assistant Director of Fiscal Management	Yes
Sharon Stinnett	sharon.stinnett@tea.texas.gov	TEA – Payroll	Yes
Shawana Abrams	shawana.abrams@cpa.texas.gov	CPA	Yes
Sheila Benavides	sheila.benavides@hhsc.state.tx.us	HHSC – Payroll, T&L	Yes
Stacey Minces	stacey.minces@cpa.texas.gov	CPA – HR/Payroll Cross Functional Analyst (CFA)	Yes
Valencia Hadnot	valencia.hadnot@tlc.texas.gov	Texas Legislative Council (TLC)	Yes
Valerie Luna	valerie.luna@txdmv.gov	Department of Motor Vehicles (DMV) – HR UG Voting Member	Phone

First & Last Name	Email	Role/Position	Attended?
Vanessa Siordia	vsiordia@tsl.texas.gov	Texas State Library and Archives Commission (TSLAC) – HR Manager	Yes

Note: attendee list may not reflect all conference call attendees.

I. Welcome (Andrea Smith)
- All User Group meeting materials will be posted on FMX beginning with this month's meeting. NOTE:
  o Materials will be posted after the meeting, not before.
  o Future User Group meetings will not provide printed handouts so if you attend regularly, please ensure your name is on the User Group distribution list so you can be emailed the meeting materials in advance. To be added to the User Group distribution list, please send an email to CAPPS Governance team at CAPPS.GTT@cpa.texas.gov.
- In order to make documents 508 compliant, the format will look different for the status updates (SR Report, Governance Approved and Required Maintenance lists).

II. Production Update: HR/Payroll Support Requests (SRs)
- SR Summary Documentation (Andrea Smith)
  o User Group members were provided with a summary of all active SRs on the HR/Payroll System. The report date is March 1, 2018 so the numbers reflect February activity.
  o There were 556 active tickets in February and 182 of those were high. Of those with a high priority, 56 are *In Work* and four are in *Rework*.
- SR Trend Report (Andrea Smith)
  o 264 new SRs were opened in February; 191 SRs were closed.
- Governance Approved SRs (Stacey Minces)
  o A spreadsheet of Governance Approved SRs was provided. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
  o There are 28 SRs for review.
    ▪ SR 3383 – moved to Acceptance Testing. This will be available for agencies to test in UAT.
    ▪ Four SRs related to Recruit have been completed: SR 4507, SR 4304, SR 4437 and SR 4687.
    ▪ Six new SRs were approved by the Steering Committee on March 13, 2018.
      ▫ SR 6632 – moved to *Assigned*.
      ▫ SR 6633 – moved to *Assigned*.
      ▫ SR 6188 – moved to *Assigned*. This SR is a request to remove withdrawn candidates from the Interview Summary Report in Recruit. It is *assigned* and expected to be in work soon.
      ▫ SR 6634 – moved to *System Test*.
      ▫ SR 5249 – moved to *System Test*.
      ▫ SR 6021 – moved to *In Work*.
    ▪ SR 1686 – moved to *In Work*.
    ▪ SR 4760 – moved to *Pending Prod Migration*. Migration has been approved so this should be in Production soon.
- Required Maintenance (Stacey Minces)

- 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 1026 – moved to *Completed*.
  - SR 4466 – moved to *Completed*. This SR was for the 2018 tax updates. 2018 is completed and work on the new calendar year will begin soon.
  - SR 5318 – moved to *System Test*.
  - SR 5420 – moved to *System Test*.
  - SR 5489 – moved to *Pending Prod Approval*.
  - SR 6096 – moved to *System Test*. This is the SR for the new query for changes made to certified timesheets for federally-funded employees. This has completed System Test and is being moved to *Acceptance Test* as of this week.
  - SR 6097 – moved to *Pending Prod Approval*.
  - SR 6197 – moved to *In Development*.
  - SR 6296 – moved to *System Test*.
  - SR 7062 – moved to *System Test*. This SR is for the upgrade of Recruit environments from 15B.9.4 to 17.3. The planned production date is April 19, 2018.

III.   Production Update: Fluid Functionality (Chelsa Vinklarek)
- User Group attendees were provided with a printed copy of the overview presentation that included key changes users will see after go-live.
  - o This summer, CAPPS will upgrade to the most recent image and PeopleTools versions. As a result of this upgrade, many of the CAPPS pages will have a new User Interface (UI): Fluid.
  - o Fluid is the new Oracle interface that makes the system simpler, more efficient and compatible with current technology trends. Many of the most used pages in CAPPS will be mobile friendly as a result of the upgrade.
  - o Fluid will replace the former UI known as Classic. Oracle will stop supporting the Classic UI two years after the Fluid UI is rolled out.
  - o Fluid will be implemented in phases starting with the most commonly used pages and including some small changes to Portal.
  - o The presentation used for today's meeting is a draft version – some of the examples provided may still change as development continues.
  - o Unified Navigation is another new function of the upgrade. Unified Navigation will allow users to navigate directly to the menus they need for both Financials and HR/Payroll directly from the Portal based on their roles/security access. The blue buttons that are used now to select either Financials or HR/Payroll will no longer be there.
  - o The Classic UI will eventually be replaced by either Fluid or Classic Plus. The Classic Plus pages work like they do today but will look like Fluid.
- Fluid will go live in Production on July 9, 2018 for CAPPS Production agencies. Deployment for new agencies is scheduled for July 16, 2018.
- There will be a live demo of the Fluid functionality during the April HR/Payroll User Group Meeting.

IV.   Production Update: CAPPS Upgrade/UAT Testing for Production Agencies (Nicki Zito)
- UAT for Recruit Release 1 UAT begins on April 9, 2018.
- UAT for image/PeopleTools upgrade will begin in mid-May.
  - o Scripts will be sent in early May as soon as they are ready.

- Nicki Zito will be the UAT Coordinator at CPA and will work with all the agencies to track UAT progress.
  - Each agency will need to identify their own UAT coordinator. The agency's Security Coordinator will need to request access for that person as well as all testers for the new UAT environment. Existing Agency Level 1 support staff will automatically be added for UAT ASP access.
  - Nicki will reach out to agencies' Level 1 support staff with her contact information and any additional details.
- The CAPPS Support Team asks that agencies plan to test as much as possible with the new image/PeopleTools upgrades as well as new Fluid functionality to validate all processes are working as expected for the agencies.
- Currently, there is no timeline for when training will be updated to reflect the upgrade. Training updates will be planned with later phases of the Fluid deployment when more functionality has been upgraded.

V. Project Update: HR/Payroll FY18 Deployment (Rusty Charlton)
- Deploying Agencies: TLC, LRL, GOV, SOS, TESRS, BRB, TVC, TBAE, TBPE, CUD, TBPG, TBCE, TJJD and TPWD.
- Go-live for deploying agencies is on track for July 16, 2018.
- Go-live for the 43 agencies currently in Production is on track for July 9, 2018.
  - The new code is moved to Production one week prior to the new deployment in order to provide a stabilization period in CAPPS.
- Key activities scheduled to occur in the next 30 days include:
  - Begin Mock 4 Conversion and Payroll Reconciliation.
  - Complete System Test Phase 2 and begin System Test Phase 3.
  - Complete CAPPS Reporting Analysis – 84% complete as of March 16 report date; as of this User Group meeting, the analysis is wrapping up.
- The CAPPS Deployment Team acknowledges an added risk related to the Hazardous Duty/Dual Employment functionality – these are specific to conversion and pay calculation.
  - These enhancements are very large – more complicated and invasive – than most Required Maintenance SRs.
  - There are no issues with these enhancements at this time. The CAPPS Deployment Team keeping a close watch on these due to the complex nature.
  - Once the changes are implemented in Production, these enhancements will need to be tested. After testing, the code will be retrofitted for onboarding.
- UAT Test prep is in progress (24% at report date). As mentioned above, the Production agencies will need to identify their UAT Coordinators and work with Nicki Zito during the UAT period. The CAPPS Deployment Team has already started this process with the deploying agencies.

VI. Project Update: Recruit FY18 Deployment (Rusty Charlton)
- Deploying Agencies:
  - Release 1: SOAH, TCOLE, RRC, TMB and TAHC.
  - Release 2: TDI, OIEC, TMD and TEA.
- This deployment will occur in two releases:

- o Release 1 is on schedule for go-live on May 21, 2018. Release 1 agencies are those with no configurations or customizations so they can be deployed on a faster timeline.
  - o Release 2 is on schedule for go-live on August 20, 2018. Release 2 agencies are those with more customization or complexity that require a longer timeline for deployment.
- Key activities in the next 30 days include:
  - o Complete Release 2 standard configuration.
  - o Complete Release 1 System Test.
  - o Release 1 UAT begins on April 9, 2018.
- The CAPPS Deployment Team is coordinating with Texas Workforce Commission on the WorkInTexas.com (WIT) interface. The new interface will allow Recruit and WIT to automatically share information.

VII. Adjourn

- Next meeting is Tuesday, April 24, 2018.