

**CAPPS
HR/Payroll User Group
Tuesday, April 24, 2018
9:00 a.m. – 11 a.m.
Travis Building, Room 1-100
Meeting Minutes**

Conference Room Attendees*

First & Last Name	Email	Role/Position	Attended
Amy Petrick	amy.petrick@dps.texas.gov	Department of Public Safety (DPS)	Yes
Andrea Davis	andrea.davis@txcourts.gov	Supreme Court of Texas (SCT)	Yes
Andrea Smith	andrea.smith@cpa.texas.gov	Comptroller of Public Accounts (CPA) – CAPPS HR/Payroll Production Supervisor	Yes
Angela Kemp	angela.kemp@dps.texas.gov	DPS	Yes
Annessia Belew	Annessia.belew@dps.texas.gov	DPS	Yes
Chelsa Vinklerek	chelsa.vinklerek@cpa.texas.gov	CPA – Area Manager, Statewide Fiscal Systems	Yes
Crystal Bennett	crystal.bennett@tdi.texas.gov	Texas Department of Insurance (TDI)	Yes
Daryn Burleigh	daryn.burleigh@cpa.texas.gov	CPA	Yes
Dean David	dean.david@tpwd.texas.gov	Texas Parks and Wildlife Department (TPWD)	Yes
Deborah King	deborah.king@gov.texas.gov	Office of the Governor (GOV) – Payroll	Yes
Dina Fletcher	dina.fletcher@tea.texas.gov	Texas Education Agency (TEA)	Yes
Donna Clay	donna.clay@cpa.texas.gov	CPA – HR/Payroll Domain Lead	Yes
Eduardo Plaza	eduardo.plaza@tpwd.texas.gov	TPWD	Yes
Holly Hutchinson	holly.hutchinson@tlc.texas.gov	Texas Legislative Council (TLC)	Yes
James Keyser	james.keyser@tea.texas.gov	TEA	Yes
Jennica Preston	jennica.preston@rrc.texas.gov	Texas Railroad Commission (RRC)	Yes
Joan McMillan	joan.mcmillan@cpa.texas.gov	CPA	Yes

First & Last Name	Email	Role/Position	Attended
JoAnn Walker	jo.walker@hhsc.state.tx.us	Health and Human Services Commission (HHSC)	Yes
Karen Peschke	karen.peschke@hhsc.state.tx.us	HHSC	Yes
Kathryn Crabtree	kathryn.crabtree@scjc.tx.gov	State Commission on Judicial Conduct (SCJC) – Staff Services	Yes
Kathryn Dolan	kathryn.dolan@rrc.texas.gov	RRC	Yes
Kathy Cortez	kathy.cortez@tea.texas.gov	TEA	Yes
Katrice Gil	katrice.gil@txdmv.gov	Texas Department of Motor Vehicles (DMV)	Yes
Kita Wissa	kita.wissa@tpwd.texas.gov	TPWD	Yes
Leonard Higgins	leonard.higgins@cpa.texas.gov	CPA	Yes
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Maggie Freeman	maggie.freeman@gov.texas.gov	GOV	Yes
Mandi Seagren	mandi.seagren@txcourts.gov	Office of Court Administration (OCA)	Yes
Michele Cook	michele.cook@tea.texas.gov	TEA	Yes
Mickey Gregory	mickey.gregory@hhsc.state.tx.us	HHSC	Yes
Monica Ferrel	monica.ferrel@rrc.texas.gov	RRC	Yes
Nicki Zito	nicole.zito@cpa.texas.gov	CPA – ERP Project Manager	Yes
Paige Steen	paige.steen@dps.texas.gov	DPS	Yes
Rebecca Kelly	rebecca.kelly@cpa.texas.gov	CPA	Yes
Rosa Sullivan	rosa.sullivan@tpwd.texas.gov	TPWD	Yes
Rusty Charlton	russell.charlton@cpa.texas.gov	CPA – ERP Project Manager	Yes
Sandra Farley	saundra.farley@cpa.texas.gov	CPA	Yes
Sharon Stinnett	sharon.stinnett@tea.texas.gov	TEA	Yes

First & Last Name	Email	Role/Position	Attended
Sheila Benavides	sheila.benavides@hhsc.state.tx.us	HHSC	Yes
Stacey Hassin	stacey.hassin@cpa.texas.gov	CPA	Yes
Tammy Chaney	tammy.chaney@cpa.texas.gov	CPA – CAPPs Production Queue Manager/Governance Coordinator	Yes
Tammy Ross	tammy.ross@cpa.texas.gov	CPA – CAPPs Communications Specialist	Yes
Toni Brown	toni.brown@cpa.texas.gov	CPA	Yes
Tonia Scaperlanda	tonia.scaperlanda@theeb.state.tx.us	Texas Higher Education Coordinating Board (THECB)	Yes
Valencia Hadnot	valencia.hadnot@tlc.texas.gov	TLC	Yes
Valerie Luna	valerie.luna@txdmv.gov	DMV – HR UG Voting Member	Yes
Vickie Smith	vicki.smith@cpa.texas.gov	CPA	Yes
Yvonne Petreczko	yppetreczko@tsl.texas.gov	Texas State Library and Archives (TSL)	Yes

**Note: attendee list does not reflect conference call attendees.*

I. Welcome (Andrea Smith)

- Note: All User Group materials are posted on FMX within a few days of the meeting.
 - In order to make documents 508 compliant, the format looks different for the status updates (SR Report, Governance Approved, and Required Maintenance lists).
- Note: Future User Group meetings will not provide printed handouts so anyone who attends regularly should request to be added to the User Group distribution list. To make a request, please email capps.gtt@cpa.texas.gov.

II. Production Update: HR/Payroll Support Requests (SRs) (Andrea Smith)

- SR Summary Documentation
 - User Group members were provided with a summary of all active SRs on the HR/Payroll system.
 - There were 524 active SRs in March and 183 were considered high.
 - There are currently no critical SRs.
- SR Trend Report
 - For the month of March, there were 251 SRs opened and 235 closed.
- Governance Approved Enhancements
 - A spreadsheet of Governance Approved SRs was provided. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - SR 3383 – moved to *Rework*.
 - SR 6917, SR 6895 and SR 4529 – moved to *In Work*.
 - SR 6920 and SR 6919 – moved to System Test.

- SR 6760, SR 6634, SR 6918, SR 5249 and SR 6021 – moved to *Acceptance Testing*.
- SR 1686 and SR 4760 – moved to *Completed*. These SRs will drop off the list after this month.
- Required Maintenance
 - User Group members were provided a list of Required Maintenance SRs. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - SR 1082 – moved to *Acceptance Testing*.
 - SR 4942 – moved to *System Test*.
 - SR 5487 – moved to *In Work*.
 - SR 6081 – moved to *Acceptance Testing*. This SR relates to the Hazard Duty payment row being added when an employee moves into a Hazard Duty position. This item previously migrated then was removed from Production in January 2018 for rework.
 - SR 6095 – moved to *Acceptance Testing*.
 - SR 6096 – moved to *Pending Prod Approval*.
 - SR 7062 – moved to *Pending Prod Migration*.
 - SR 7144 – moved to *In Work*.
 - SR 7186 – moved to *In Work*.
 - SR 7248 – moved to *In Work*. This SR relates to employee name changes in the Employee Self-Service section. The issue will be resolved with the image upgrade in July.
 - SR 7406 – moved to *In Work*.
 - SR 5420, SR 6097 and SR 6197 – moved to *Completed*. These SRs will drop off the list after this month.

III. Production Update: Fluid – Live Demo (Chelsa Vinklarek)

- Highlights from the demo:
 - The new portal uses Unified Navigation.
 - Once a user is logged in, they never leave the portal.
 - The back button will always take the user back to the Home page but users can move around within the portal using the left-hand Navigation panel.
 - The left-hand Navigation panel can be hidden from view for a full screen view.
 - The look and feel is very similar to the classic version users are accustomed to seeing.
 - The database is the same so there will be no loss of information.
 - Timesheets will remain the same and use the same Search feature.
 - *View Payable Time* has a slightly different look and feel but content is the same.
 - The monthly time report will not change.
 - The *Leave Balances* page will change. The new page has all leave categories listed in a single box with the balance displayed rather than users scrolling through different boxes for each category.
 - For *Comp Time Expiring*, users will see all the expirations automatically with the expiration date instead of having to select a date range.
 - Users' existing favorites will no longer be available and will need to be resaved after deployment.
 - The Fluid pages are completely new pages (new code) so the current pages will be removed and no longer available.
 - The pages themselves are new but their names and locations in the menus will remain the same. The menus are not being reordered.

- Fluid is being rolled out in a phased approach. As Oracle rolls out new Fluid pages, the CAPPS Support Team is reviewing to determine which pages need to be deployed first.
 - Once Oracle has released a page in Fluid, the classic version of the page will only be supported for another two years.
- During the March User Group, agencies asked whether User Acceptance Testing (UAT) would include Mobile testing.
 - Testing will occur in the UAT3 environment.
 - Testing must be done from a State device connected to the tester's agency network.
 - Testers are welcome to test from their agency-approved mobile devices but Help Desk support for mobile testing will not be provided.
- Action Items/Questions:
 - Question: In the *Payable Time* window, will users be able to click on the headers to sort by the column?
 - No, the Fluid ESS *Payable Time* page does not have a sortable grid.
 - Question: Will the *My Pay* page be printable to PDF?
 - No, the Fluid My Pay page is not printable to PDF.
 - Question: On the *Leave Balances* page, can the names of the leave categories be spelled out because the way some of them are abbreviated currently is unclear?
 - This is delivered functionality; however, the CAPPS Support Team is going through an effort to standardize the descriptions on the *Leave Balances* page and other pages where the Comp Time Plans display. It was identified as a defect during testing and will be worked soon.
 - Question: Is there a way to enter all the Leave Accounting Codes (LACs) without actual time being entered with them, so employees can enter all their usual codes and fill in the time later?
 - LACs may not be saved without an associated time entry. If time is entered for the exact scheduled hours without an LAC or Override Reason Code (ORC), time will be automatically approved and employee will not be able to update the row. If time is entered with an LAC or ORC, the time will still be available for the employee to update until approved.

IV. Production Update: New Deployment Enhancements and Modifications (Joan McMillan and Daryn Burleigh)

- SR 6960 – This report will identify anyone who went above 30 or below 29 hours per week.
- SR 5359 – This report will identify FMLA and Parental events. The process will create three reports: open/expired, open/unexpired, or terminated employee with open/unexpired events by agency and business unit. This should make it much easier for FMLA coordinators to manage events.
- - Both of these reports have the option of Microsoft Excel format and will be multi-tenant.
- SR 5318 – Users will have the ability to view/search by ORC description. This function will work on all timesheets.
- SR 6769 – This new interface creates a process that will run nightly to produce a large data file of records.
 - Types of records included in the data dump will be:
 - Time and Labor data
 - History of active employees

- Employees who left the agency within a specified date range
 - Position vacancy data
 - A draft version of the file layout is available in the Application Service Provider Solution Center (ASPSC) ticket. It does not have field descriptions but will include business units/departments.
 - This module will be optional for all agencies and will be implemented for Central Agencies in July and for Hub Agencies in August.
- V. Production Update: UAT for Production Agencies (Nicki Zito)**
- UAT for Central agencies will begin on May 14 and continue through June 29, 2018.
 - UAT will be available to Hub agencies beginning on May 21, 2018.
 - Nicki Zito has reached out to all agencies to identify their UAT Coordinator. She will be reaching out again this week to any agencies that have not yet identified their coordinator.
 - Nicki will be sending all information out to the UAT Coordinators.
 - A Network Connectivity notification with instructions will be sent out in early May to ensure everyone can access the UAT3 environment.
 - User Security Roles have all been converted into the new UAT3 environment from UAT1 as of April 16 and all existing ASP users will have access to ASPUAT.
 - If agencies need to add new users, they should have their Security Coordinator submit a request via the usual process.
 - The CAPPs Support Team recommends the following schedule for UAT testing:
 - Week 1 – Test all processes end-to-end.
 - Week 2 – Test new enhancements and Fluid modules.
 - Weeks 3 through 7 – Test everything thoroughly, see if it can be broken.
 - Scripts will be sent on or before the May 14 start date.
 - UAT has a separate ASPSC that is separate from the Production ASPSC.
 - If testers have issues in UAT, they should open a ticket in the UAT ASPSC.
 - Do not log UAT issues into the Production ASPSC.
 - As a reminder, UAT is intended for experienced users who can understand the processes and can fully evaluate the new enhancements/mods. UAT is not set up for training new users. UAT is a chance for agencies to take new screenshots and update their training materials.
- VI. Upcoming Vote: SRs Submitted to Governance (Andrea Smith and Rebecca Kelly)**
- There are five HR/Payroll SRs being submitted for User Group consideration; the vote will be distributed via e-survey.
 - SR 5021 (B) – This Recruit SR was originally requested to remove a candidate’s employment preferences from view when printing applications. This SR was previously approved through Governance with Option B being selected. However, removing the preferences from the printable view cannot be implemented. The SR is being resubmitted through Governance with options to either:
 - Keep Option B and leave the preferences in the printable view while they are removed from the online view, or
 - Reject Option B and leave candidate preferences as they were originally visible.
 - SR 5536 – This Recruit SR is a request to disable the feature that creates candidate profiles for New Hires. The proposed solution is to retire the internal CAPPs Career Section interface that is shared across CAPPs internal Candidates.

- The external career section and agency-specific internal career section would remain in Production. A handout with complete details was provided to User Group Members.
- SR 6505 – This Performance Management SR is a request to disable the worklist generation process for managers who have completed evaluations. The proposed solution is to update the configuration in the Appraisal Transaction Approval process.
- SR 6571 – This SR was initiated by DPS. The proposed solution will update the run control so that an agency can run the BioSketch report by department. Currently, the report is run by employee only.
- SR 7295 – This SR is a request to create a new Performance Management query that displays specific fields: Employee ID, Employee Name, Hire Date, Business Unit, Department, Type of Evaluation, Date Last Evaluation Signed, Evaluation Rating and Next Evaluation Due Date.

VII. 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.
- On track for go-live on July 16, 2018.
 - A key risk has been identified for the Hazard Duty and Dual Employment changes but this item is currently on track for deployment.
- System Test Phase 3 and Conference Room Pilots continue.
- CAPPS Reporting analysis and the Mock 4 Conversion should be completed in the next 30 days.
- The UAT Kickoff will be April 26, 2018. UAT begins in mid-May. Agencies should review the UAT details provided by Nicki Zito.

VIII. 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:
 - 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.
 - 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.
- The project is on track for both releases.
 - Release 1 UAT ends April 27, 2018.
 - Some agencies have completed most of their UAT testing. Some agencies have more testing that needs to be completed before Friday. The CAPPS Deployment Team will escalate to agency management as needed.

IX. Adjourn

- The next CAPPS HR/Payroll User Group Meeting will be on Tuesday, May 22, 2018.