

CAPPS HR/Payroll Governance Approved Enhancements

Date of Report: 11/15/19

Service/Support Request (SR) Information
Enhancements (SRs) Approved by Governance - ACTIVE

Gov. 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
1	11815	37.57	DPS	CAPPS HR/Payroll	Yes	Performance Management	Medium	Medium	Turn off auto transfer functionality, when documents are manually transferred	We have occasions where an evaluation is auto transferred to a new manager, but then it's manually transferred back to the previous manager for completion. Unless the eval is completed it will auto transfer back to the new manager each night. We are requesting an enhancement to turn off the auto transfer feature when we manually transfer an evaluation, so it won't transfer to the new manager.	When a manager uses the 'Transfer Documents' feature, the nightly HR processes automatically returns the document back to the original manager based on the 'Reports To' structure. This causes the manager to transfer the document on a daily basis.	Modify the PM process associated with Performance Management. If the document is manually transferred by a manager or agency administrator, the nightly PM processes will be bypassed. NOTE: This solution will exclude the document from future actions associated with HR Roll-up/Roll-down process. Agencies will need to manage internal business processes related to transferring performance documents.	In Work	
2	8873	34.67	DPS	Performance Management	Yes	Performance Management	Medium	Low	Grant 2nd Level Access to Comments in Checkpoints	In reference to SR 7175, we would like to request that second level managers and higher have access to view the comments entered by the first line supervisor throughout all steps of the process even if the document is not shared with the employee, similar to the Administrator's view.	The managers currently only have view access to comments, when the manager shares with the employee. All managers within the employee's Reports To structure should have view access to any comments entered by the manager, during all steps of the evaluation process.	Implement the proposed code change to allow all managers within the employee's reports to structure to view the document. The comment field will not be hidden.	In Work	
3	3023	34.2	DPS	CAPPS HR/Payroll	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.	In Work	Placing on hold until issues with the Comp Leave Balance Detail Report in SR14813 are resolved. SR14813 status is now In Work
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 ToEmplid • 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)	*System Test	

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	5	8889	30.57	DPS	CAPPS HR/Payroll	Yes	Performance Management	Low	Medium	Allow managers to edit/update previous attachments	We've discovered that if an evaluation is transferred the gaining supervisor does not have the ability to edit or remove any items that the original supervisor added such as attachments. In the event the original supervisor has left the agency or is out for an extended period of time, the gaining supervisor needs to have the ability to make changes to the items added by the original supervisor. We would like to request that the gaining supervisor have the ability to update the audience on attachments and/or remove them.	Currently only the manager that added the attachment to the employees document, is able to modify or delete the attachments. The request is to allow any manager within the employee's 'Reports To' structure or the Agency Administrator the ability to modify or delete the attachments.	The security permissions would be modified to allow managers or agency administrators access to modify or delete attachments.	*System Test	
	6	5046	29.6	DPS	CAPPS HR/Payroll	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.	*Completed	
	7	7972	28.17	DPS	CAPPS HR/Payroll	Yes	Performance Management, Security	Medium	Low	Modify Permission List for TX_EP_AGENCY_ADMIN role	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). 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.	1. Make the Maintain Performance Notes functionality available Agency Performance Management Administrators in addition to Managers (requested by DPS in SR 6753). 2. Remove access to the Development Documents menu as this is not functionality used in CAPPS. Having the menu available may cause confusion.	Modify the Permission List for the TX_EP_AGENCY_ADMIN role so that individuals with that role: 1. May View, Update, Delete and Transfer Performance Notes 2. To not include access to the menu item for Development Documents	*System Test	
	8	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.	1. Modify the TX_SS_MANAGER_EPM role so that it no longer includes access to the Delete Documents page. 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. 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. <i>Note: For agencies with specific templates an ASP ticket can be submitted to add this to their agency-specific template.</i>	*System Test	

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	9	1111	OCA/SPA	CAPPS Reporting Team	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.	In Work	Pending Development Assigned to the CAPPS Reporting Team
	10	205	DMV	CAPPS HR/Payroll	Yes	Payroll	Low	Low	Save Warning Message when making direct deposit/W-4 updates in ESS	When the direct deposit information is about to be changed, add a message box or wording alerting the employee that he/she might get a warrant depending on when the payroll is ran. We understand that we need to have a schedule to the users for them to know when they can make changes to their banking information without affecting the direct deposit into they account but the message will help.	When the employee makes a direct deposit / W4 add / change and hits 'submit' the warning message will appear prior to completing the transaction. The employee at this time has an option of clicking 'ok' to save the changes or opt-out.	Add a new submit warning message when creating or making direct deposit updates in ESS: The new warning message must be displayed at the end after all the ESS direct deposit page edits passes when the submit button is clicked. Transaction should be saved after Clicking Ok on the warning message pop up. After Clicking Ok on the warning message pop up, Submit Confirmation should display and Email notifications will be sent (Currently the email notification is sent on Submit) Add a new submit warning message when making W-4 updates in ESS: The new warning message must be displayed at the end after all the ESS W-4 page edits passes when the submit button is clicked. Verify Identify pop up will show up after Clicking Ok on the warning message.	In Work	
	11	3383	DPS	CAPPS HR/Payroll	Yes	Reports	Medium	Medium	Add items to the TX_HR_AGY_NEW_HIRE_S_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.	*System Test	
	12	10476	CPA	Talent Management	Yes	Learn	High	Low	Messages feature missing for Training Admins	Message icon feature in Enrollments section not enabled for training admins, even when instructor is listed as system admin on ILT and enrollment. Tested role in Stage, same issue. The feature is not enabled for the TA role. Screenshot of current view and view when feature is enabled below.	This request is to allow Training Administrators: view, edit and send messages associated with a Course Enrollment.	This request is to enable/add the permissions for associated with Messages and limited to Enrollments.	Governance	
	13	4138	DPS	CAPPS Reporting Team	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.	*Completed	Migrated to Production 10/3/19

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14	7973 (Part A) 10847 (Part B)	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.	Create a new security role that includes View access to all of the following: <ul style="list-style-type: none"> Maintain Performance Notes Define Criteria Status View Documents Approve Documents <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 supersedes the View access granted with the TX_EP_OPEN_RECORDS_ADMIN role</i>	Part A: Completed Part B: *System Test	Part A: The Agency Admin access to view the employee document details in the Define Criteria step was migrated to Production on 11/01/2018. Part B: Additional work required for permissions
15	4058	17.6	DPS	CAPPS Reporting Team	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.	*Completed	Migrated to Production 10/3/19
16	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.	In Work	Pending Development Assigned to the CAPPS Reporting Team
17	15390	17	CPA	Talent Management	Yes	Learn	Low	Low	BI Reports delete option for TC Roles	Feedback from our agency TCs needing to delete test bi reports accumulating in their Report List view. Currently, the button is only active with system admin role.	The Training Coordinator and Training Administrator roles have permissions/capabilities to create private BI reports, from the standard delivered reports. However these roles are not able to delete reports. These users normally are required to create numerous reports by date created, without the capability to delete the previous reports. The agency is requesting to add 'delete' permission for private reports.	This request is to enable/add the 'delete' permission to the BI Reporting functionality, for the Training Coordinator and Training Administrators. The user will be limited to deleting custom reports they created.	Governance	
18	17226	15.29	CPA	Talent Management	Yes	Recruiting	Low	Low	Remove the default Requisition filter Draft	Configure the list formats of the default Requisition filter which is currently set to 'Draft', and update it to have no filter on Requisitions. When users click on the requisitions, Recruit will show no filter such as Open, Draft etc. so users can expand the Requisitions field and filter out with any statuses	The request is to change the default filter from showing the CAPPS Recruit users the Draft requisitions to showing all the active requisitions. The user can then filter the requisitions further if needed. Many times the users would rather look at requisitions in other statuses (mostly Open status) rather than Draft status, so today it requires the user to modify the filter almost every time.	Modify the CAPPS Recruit list format configuration to change the default filter on the requisition view.	Governance	

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19	2374	12	DPS	CAPPS HR/Payroll	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.	In Work	Pending Development Assigned to the CAPPS Reporting Team
20	8827	11.17	DPS	Talent Management	Yes	Reports, Recruiting	Medium	Medium	Recruiting OBI new reports request	We would like to request 9 new reports in CAPPS Recruiting OBI. Using the Agency Dashboard report as a guide and take each section and build it into a separate report, i.e. Exec. Recruiting Summary # of Openings and # of Submissions as one report, Exec. Recruiting Summary Not Selected Report as another, so on and so forth. This report frequently times out due to the number of rows that continue to generate (currently over 70,000 rows) as we continue to use CAPPS and we are unable to pull that data we need for reporting to our leadership.	Remove the set of 9 custom reports that are embedded in the custom Dashboard file called "TX - Agency Dashboard", and allow these to be run individually rather than always as a set in the Dashboard.	<p>In CAPPS Recruit OBI:</p> <ul style="list-style-type: none"> - Remove the set of 9 custom reports from the existing custom Dashboard file called "TX - Agency Dashboard". - Typically we create new Prompt Files for each report but in this case the existing reports currently all use the same prompt file so we could leverage that prompt file for each of the 9 (new) individual reports. (Note: the reports already exist and work, they just need to be split out so that they can be run individually by the Agency Users. There is no new build effort needed for the reports for this request.) - Create a set of 9 new dashboard files - one for each of the individual reports (each dashboard has the name of the report), and add the reference to the prompt file as well as the reference to the report file to each dashboard file. - Deploy the new dashboard files to all the Agency reports folders (maintaining our multi-tenancy approach). - Remove the existing dashboard file called "TX - Agency Dashboard" from each of the Agency Report folders. 	In Work	
21	16900	8.67	DPS	CAPPS HR/Payroll	No	HR Human Resources	Low	Low	Add Disciplinary Steps	Under Record Disciplinary Actions, CAPPS will not allow 'Action Taken' rows with a duplicate 'Disciplinary Step' code. Therefore, we would like to add the following Disciplinary Step codes to the list: Descr / Description TNE / Training – EEO TNT / Training – Ethics TNL / Training – Leadership TNO / Training – Other	The change is to add the requested steps to the Disciplinary Code table. These steps will be available for all agencies if applicable.	Update the Disciplinary Code table in CAPPS Recruit to include the proposed steps.	Governance	
22	8506	5.17	DPS	CAPPS HR/Payroll	Yes	Reports	Low	Medium	New dual employment query	Agency would like to run a query that shows any employees dually-employed at another agency.	The State Employees Employed By More Than One State Agency does not show SAD1 employees. Agency is requesting a simple query that shows all employees dually-employed.	Since Query Manager Won't allow agencies to view other agency information, I suggest we create a view that can, in turn, be used as a query.	In Work	