

CAPPS HR & FIN User Group

Thursday, Jan. 23, 2020
9 – 11 a.m.
Travis Building, Room 1-111
Meeting Minutes

I. Welcome (Andrea Smith)

- This is a Webinar through Webex.
- User Group meeting materials will be posted on FMX.
 - To be added to the User Group distribution list, please send an email to the CAPPS Governance and Communications team at CAPPS.CGC@cpa.texas.gov.
- Introduce Farrah Barron, CAPPS administrative assistant on the CAPPS Governance team.

II. Production Update: Financials Support Requests (SRs) (Anthony Martin)

- **SR Summary and Trend Report**
 - The *CAPPS Financials Summary and Trend Report 01/23/20* document was reviewed.
 - In December, there were 914 active SRs with 340 in high priority status. There were no critical SRs.
 - As shown on the Trend chart, there were 438 SRs opened and 334 closed in December. 60 tickets are for Hx Recycle as we transition from the email distribution list to role based.
- **Governance Approved Enhancements**
 - The *CAPPS Financials Governance Approved SRs 01/23/20* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and bolded.
- **Required Maintenance**
 - The *CAPPS Financials Required Maintenance 01/23/20* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and bolded.

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

- **SR Summary and Trend Report**
 - The *CAPPS HR/Payroll Summary and Trend Report 01/23/20* document was reviewed.
 - In December, there were 839 active SRs with 153 in high priority status. There were no critical SRs.
 - As shown on the Trend chart, there were 571 tickets opened and 601 tickets were closed for December.
 - Calendar Year-End was a large cause of the uptick in tickets.
- **Governance Approved Enhancements**
 - The *CAPPS HR/Payroll Governance Approved SRs 01/23/20* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and bolded.
- **Required Maintenance**
 - The *CAPPS HR/Payroll Required Maintenance 01/23/20* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and bolded.
 - SR 17981 is a Recruiting module that will automate CAPPS Recruit Security assignments for MSS Lite Managers. There will be another update on this in February's User Group.

IV. Upcoming Vote: SRs Submitted to Governance (Andrea Smith)

- The **CAPPS SRs Submitted to Governance 01/23/20** document was reviewed. Updates since the last meeting are identified with an asterisk (*) and bolded.
 - SR 17997 is a Reports and Recruiting module to add a column on the Candidate History Detail Report that lists all candidates who have applied for a requisition.
 - SR 14478 is a Time and Labor module to add a Warning message to remind employees that a document in pay may occur if the flexed hours are not accounted for by working additional hours (REGHR) during the same FLSA workweek.
 - If a message flags for an employee and the employee ignores it the manager can only see it on the timesheet, it will not show on the manager summary approval page.

- V. Project Update: FIN Fiscal 2020 Deployment (Nyguel Sanders)**
 - The **CAPPS Fiscal 2020 FIN Agency Deployment Project 01/23/20** document was reviewed.
 - The project is green and on track. There are eight deploying agencies. The Code Move date is July 6, 2020. The Soft Go-Live date is Aug. 10, 2020. The implementation date is Sept. 1, 2020.
 - Key items in the next 30 days:
 - Continue Prototyping Sessions
 - Complete Mock 1 Conversions
 - Begin Train the Trainer Sessions
 - Hold the Security Essentials Webinar

- VI. Project Update: HR/Payroll Fiscal 2020 Deployment (Diana Urban)**
 - The **CAPPS Fiscal 2020 HR/Payroll Agency Deployment Project Dashboard 01/23/20** document was reviewed.
 - Introduced Karl Thomason, the new HR Project Manager for CAPPS. He will be presenting this Dashboard beginning with February's User Group meeting.
 - The project is green and on track. There are ten deploying agencies. The Code Move Date is July 6, 2020. The Go-Live date for deploying agencies is July 13, 2020.
 - Key items in the next 30 days:
 - Complete Mock 2 Conversion and Phase 1 System Test
 - Conduct Mock 3 Conversion and Phase 2 System Test

- VII. Project Update: Fiscal 2020 Recruit (Martin Dassi)**
 - The **CAPPS Fiscal 2020 Recruit Project Dashboard 01/23/20** document was reviewed.
 - The project is green and on track. There are five deploying agencies. The Onboarding Implementation date for CPA is January 29, 2020. The Go-Live date is May 28, 2020.
 - Key Items in the next 30 days:
 - Continue Conference Room Pilot (CRP) sessions
 - Continue Technical Design Documents (TDD)
 - Continue Functional Design for Reports (FDD)
 - Complete User Acceptance Testing (UAT) and Go-Live for CPA Onboarding

- VIII. Project Update: Fiscal 2020 ELM (Martin Dassi)**
 - The **CAPPS Fiscal 2020 Recruit Project Dashboard 01/23/20** document was reviewed.
 - The project is green and on track. There are two deploying agencies. The Go-Live date is April 6, 2020.
 - Key Items in the next 30 days:
 - Begin and Complete Environment Re-Build for Smoke test and Conversion

- Continue System Test with Mock Data
- Complete Accessibility Test Preparation
- Complete Preparation for Conference Room Pilots (CRP) sessions

IX. Discussion Topic: Change to Reports Distribution for Financials (Lauren Denby)

- CAPPS Financials is moving from hard-coded report distribution, to role-driven.
- To facilitate this change, the CAPPS Financials Help Desk created ASP Service Requests for your agency along with a list of your current report distribution recipients.
- The name of the new role to be requested is provided in the spreadsheet that is contained in the Service Request. These changes will be available for UAT testing from now until Wednesday, Jan. 29, 2020. Your security requests must be completed by Feb. 1, 2020 for all users in order to continue to receive the report distributions.

X. Discussion Topic: Calendar Year-End (CYE) Update (Saundra Farley)

- CAPPS opened up SRs for all agencies in November for reconciliation. Once CAPPS has the authorization form, it will be finalized and made available to all employees, if you opted for that option.
- The 2020 W-4 is loaded and CAPPS is requesting agencies to push this out for their employees.

XI. Discussion Topic: New PeopleSoft Dashboard/Portal Replacement Updates and UAT (Stephen Keltgen)

- Agency User Acceptance Testing (UAT) is scheduled for February 10 through March 20. Due to the magnitude of this change, agencies need to ensure participation in the testing effort during this period. The agencies need to submit a request for UAT access, through their agency security coordinator, for any test user without current UAT access.
- The CAPPS Support staff will open a Service Request (SR) ticket in the Application Servicer Provider Solution Center on behalf of each agency. The CAPPS support team will provide UAT instructions, and a Desk Aid prior to February 10.
- Key Changes:
 - CAPPS URLs are changing – new URL information will be provided prior to go-live.
 - Limited tiles will be visible, based on User Profile/Access.
 - Favorites will not be transferred; users need to reset them after implementation. Breadcrumbs will be replaced by the Navigator feature.
 - The “Forgot My Password” link will be added to the CAPPS Log-in page.
 - The Forgot Password features (security questions and reset the password) will be under the Employee Self-Service “My Profile” tile.

XII. Upcoming Meetings:

- Feb. 25, 2020 Travis 1-111 for another joint session with FIN and HR.