



Centralized Accounting and Payroll/Personnel System

**ePerformance Management:  
Auto-Save Delivered Functionality**

Feb. 24, 2022

# Auto-Save Delivered Functionality

- Primary benefit — the elimination of users losing large volumes of data entered and needing to re-enter lost data when session expires.
- Agencies can test this by making a few changes, letting the session expire and logging back in to ensure the changes made were saved.
- Agency User Acceptance Testing (UAT) is Feb. 28 – March 4.
- Migration to production is scheduled for March 10, 2022.

# Auto-Save Delivered Functionality continued...

Based on agency template configurations, as part of the *Auto-Save* functionality, changes may include the following:

- Ratings
- Comment text
- Adding or deleting *Content Items*

The screenshot displays a web-based performance evaluation interface. The main header is 'Performance Process'. The left sidebar, titled 'Team Performance', lists various steps and tasks with due dates. The 'Update and Submit' step is currently selected and highlighted in yellow. The main content area shows the 'Manager Evaluation - Update and Submit' form. It includes a 'Manager Rating' dropdown menu set to '4- Exceeds Expectations' with a value of 4.00. Below this is a 'Manager Comments' text area with a rich text editor toolbar. At the bottom of the form, there is an 'Employee Comments' text area containing the text 'Employee has not completed their self-evaluation'. The interface also shows a 'Goals Summary' section and an 'Attachments' section at the bottom.

# Auto-Save Delivered Functionality continued...

A pop-up window appears notifying users that the session will expire.

The screenshot displays a web application interface with a red header bar labeled "Performance Process". A browser window in the foreground shows a "Timeout Warning" dialog box with the text: "Your session is about to expire. As a security precaution, sessions end after 30 minutes of inactivity. Click OK to continue your current session." The background application shows a navigation menu on the left with items like "Checkpoint 2 - Skipped", "Finalize Criteria", "Nominate Participants", "Review Participant Evaluations", "Review Self Evaluation", and "Complete Manager Evaluation". The "Update and Submit" option is highlighted. The main content area includes "manager Comments", "Employee Comments" (with the text "Employee has not completed their self-evaluation"), "Attachments" (with a message "No Attachments have been added to this document" and an "Add Attachment" button), and "Audit History".

# Auto-Save Delivered Functionality continued...

Fields that allow edits (based on the agency's specific template or statewide configurations) and were changed, are saved after the session has timed out.

The screenshot displays a web application interface for a performance process. On the left, a sidebar titled 'Team Performance' contains a 'Performance Process' section with a list of 'Steps and Tasks'. The 'Update and Submit' step is highlighted in yellow, and a dropdown menu is open below it, listing options: 'Pending Approval', 'Share with Employee', 'Request Acknowledgement', and 'Pending Acknowledgement'. The main content area is titled 'Performance Process' and shows 'Statewide Long Document Type' and 'Manager Evaluation - Update and Submit'. A 'Change Dates' button is visible. Below this, there are tabs for 'Type of Evaluation', 'Goals/Objectives', 'Core Competency', 'Overall Summary', 'Career Development', 'Job Description', and 'Employee Comments'. The 'Goals/Objectives' tab is active, showing 'Section 2 - Employee Goals' with an 'Expand' button. A goal is listed as 'Goal 1: ADDED GOAL (UPDATED)' with a description 'New Goal Added updated goal'. Below the goal, there is a 'Manager Rating' dropdown set to '4- Exceeds Expectations' with a value of '4.00'. A 'Manager Comments' text area with a rich text editor toolbar is also present. At the bottom, it shows 'Created By' and 'Last Modified By' fields with dates: '01/19/2022 7:23PM' and '01/23/2022 10:50PM'.

# Auto-Save Delivered Functionality continued...

The date and time stamps are shown as “Last Modified By” — this shows who the user was that made changes at the time the last Session expired.

“Last Modified By” can be seen in both the Audit History at the bottom of the document page and at the *Content Item* that was saved.

The screenshot displays a web interface for a 'Performance Process' document. The document title is 'Statewide Long Document Type' and the current view is 'Manager Evaluation - Update and Submit', last modified on 01/23/2022 at 10:50PM. The interface includes a 'Goals Summary' section with a 'Manager Rating' of 4.00 (4 - Exceeds Expectations) and a text area for 'Manager Comments'. Below this is an 'Employee Comments' field containing the text 'Employee has not completed their self-evaluation'. An 'Attachments' section indicates no attachments are present. At the bottom, an 'Audit History' table is visible, showing the document was created on 01/10/2022 at 8:36:08PM and last modified on 01/23/2022 at 10:50:21PM. A left-hand navigation pane lists various steps and tasks, with 'Update and Submit' currently selected.

Step	Due Date
Define Criteria	01/30/2021
Checkpoint 1	03/01/2021
Checkpoint 2 - Skipped	07/04/2021
Finalize Criteria	11/01/2021
Nominate Participants	01/10/2022
Review Participant Evaluations	01/15/2022
Review Self Evaluation	01/15/2022
Complete Manager Evaluation	03/01/2022
Update and Submit	

Field	Value	Date/Time
Created By	[Redacted]	01/10/2022 8:36:08PM
Last Modified By	[Redacted]	01/23/2022 10:50:21PM



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# Thank You!

**Deployment**

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