



Centralized Accounting and Payroll/Personnel System

# **CAPPS Fiscal 2022 Deployment Customizations**

# Fiscal 2022 Onboarding Customizations

## Upgrades

- **HCM PeopleTools Upgrade to 8.59.08**
  - Reference: SR 31668
- **HCM Image Upgrade to 40**
  - Reference: SR 31670

# New Fluid Functionality in HR

## Fluid Position Data

- Will remove Classic *Position Data* component access. Users will enter position transactions on fluid *Position Data*.
- Added Effective Sequence to Fluid Position Data.
- Reference: SR 31677.

## Fluid Job Data

- Will remove Classic *Job Data* component access. Users will enter job transactions on fluid *Job Data*.
- Reference: SR 31675.

# New Fluid Functionality in HR...(continued)

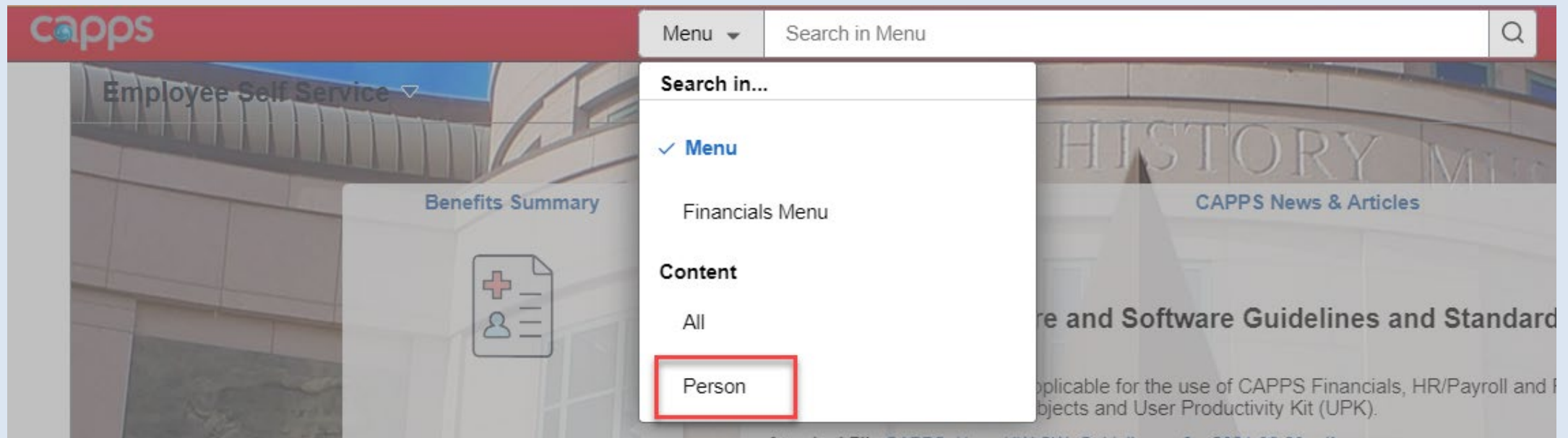
## Update CAPPS Custom Hire for Fluid Job Data

- Edits remain consistent with current functionality.
- Personal Data pages remain consistent with current functionality.
- Add Relationship Functionality:
  - **New Employees and New Contingent Workers**  
New Hire to CAPPS Central or new to the agency (**establishing a new empl\_rcd**):  
Use the *Classic Plus Job Data pages* to complete the new hire transaction.
  - **Hires with existing Job Data within the agency**  
Agency Rehires, Contingent Workers who previously worked for the agency (**no new empl\_rec**):  
Use the *Fluid Job Data pages* to complete the new hire transaction.
- Reference: SR 31676.

# Other New Features in HR

## Global Person Search

- Enhanced Global Search to provide the ability to search data on a **person** with free text and wild card search capability with multi-tenant functionality.
- Reference: SR 31681.



# Other New Features in HR...(continued)

## Company Table Navigation

- Added Company Table to the left-hand navigation to easily access via the Dashboard and Tile navigation.
- Navigation: Workforce Administration > Manage Human Resources > HR Administration > Setup.
- Reordered items in the Setup Menu.
- Reference SR 31324.

The screenshot displays the 'Manage Human Resources' interface. The left-hand navigation menu is visible, with 'Company Table' highlighted in a red box. The main content area shows the 'Job Data' search form, which includes a 'Find an Existing Value' button and a 'Search Criteria' section. The search criteria section contains several fields with dropdown menus and text input boxes, including 'Empl ID', 'Empl Record', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', 'Middle Name', 'Organizational Relationship', 'Business Unit', 'Department Set ID', 'Department', and 'Company'. At the bottom of the search form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria', along with checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'.

# Other New Features in HR...(continued)

## Email and Phone Validation

- Added validations added to the Employee Self-Service Contact Details and Emergency Contacts page and the Person Data Contact and Emergency Contacts pages used by HR core users under HR Administration.
- To ensure the email address entered is valid, email validations use:
  - The @ symbol
  - User name with periods
  - domain locations
- Phone number validations require at least five digits to be entered.
- Reference: SR 31682.

# Break/Fix for SPRS Interface

SPRS HR Outbound Interface for Hourly Semimonthly Employees (Paygroup HRL):

- Updated the process to assign the correct CAPPS Pay Cycle (SPRS Pay Frequency) value to SPRS.
- Reference: SR 36258



# New Fluid Functionality in Time & Labor (TL)

- **Fluid Timesheet**

- Retiring the custom timesheet and using the delivered **fluid timesheet** for employees, managers, time administrators and *Time & Labor* (TL) super-users.
- Reference: SR 31678.

- **Fluid Reported Time Approvals**

- Working in tandem with the fluid timesheet, we are implementing the *Approval Workflow Engine* (AWE) for the routing of approvals after an employee enters time.
- Reference: SR 32097.

- **Fluid Time and Labor WorkCenter**

- Use *WorkCenters* to organize and quickly navigation to various TL pages and components. The new TL *WorkCenter* will be available for managers, time administrators and TL super-users.
- Reference: SR 31679.

# New Fluid Functionality in Time & Labor (TL) ...(continued)

- **Fluid Manage Exceptions**
  - *Fluid Manage Exceptions* will become available for time administrators and superusers. Reference: SR 31683.
- **Time Summary and Time Calendar Views**
  - These views are delivered pages/components that allow various views into *Reported Time* and *Payable Time* for a selected employee.
  - Reference: SR 32098.

# New Features in Time & Labor (TL)

## Effective Dated Value Lists

- This feature allows the use of the effective dated value lists in Time and Labor rules based on the DUR (date under report) of the transaction being processed.
- New additions/deletions to the value lists using a **future** effective date does not impact retroactive changes to the reported time.
- Reference: SR 31325.

# New Fluid Functionality in Payroll

## Fluid W-2/W-2c View Form

- Employee's view into their W-2 and W-2c forms will be converted to deliver fluid functionality. The PDF form remains as such, but the pages leading up to the PDF will be converted.
- Reference: SR 31685.

## Fluid Direct Deposit Changes

- Employee and Superuser views into *Direct Deposit* will have the same look and feel with minor changes made to the page. Oracle decommissioned support on the classic *Direct Deposit* page on Dec. 31, 2021.
- Reference: SR 31686.

# Break/Fixes for Payroll

## Data Integrity Error – Adding existing Payroll Checklist

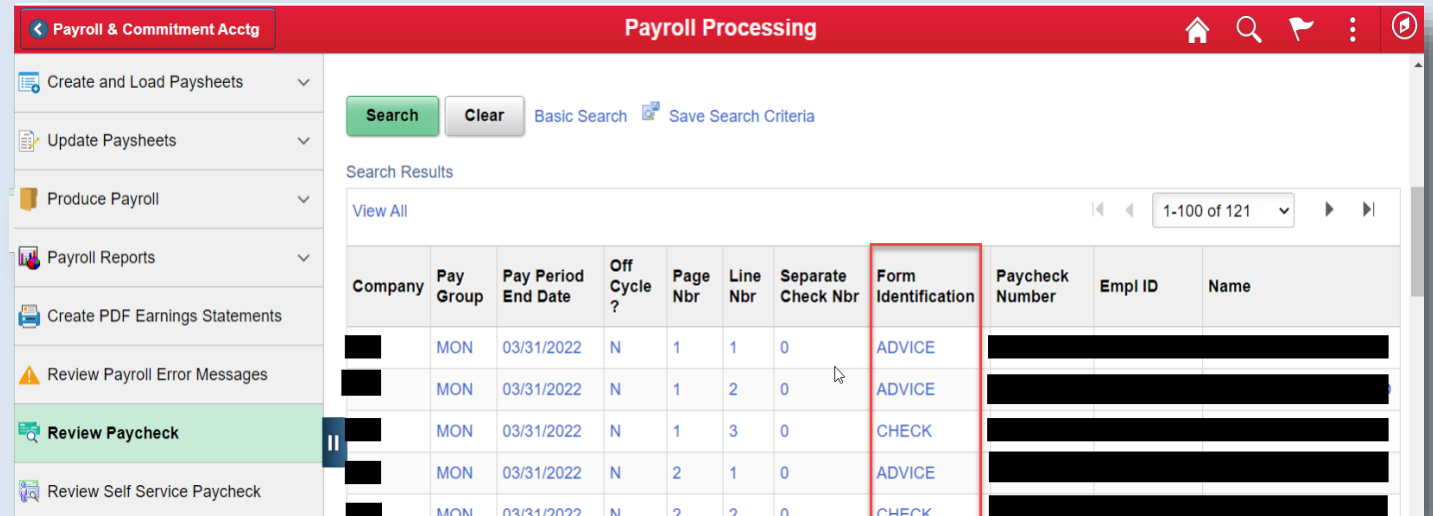
- Oracle bug on fluid pages that use pivot grids as a mechanism for searching.
- Reference SR 21614.

# Direct Deposit Prenote

## CAPPS Direct Deposit Prenote Default Value

Uncheck the Prenote Flag (global CAPPS configuration):

- For CAPPS Employees, prenote functionality resides in TINS.
- Delivered Oracle/PeopleSoft Prenote functionality is not used. However, it can cause confusion as a default value is included on the Paycheck Search page.
- Currently, all paychecks processed within 14 days after a Direct Deposit change indicate that a Check/Warrant was processed. This is often incorrect. Moving forward, the Form Identification for payments with Direct Deposit/Advice instructions defaults to “Advice.”
- Reference: SR 31321.



The screenshot displays the 'Payroll Processing' interface. On the left is a navigation menu with options like 'Create and Load Paysheets', 'Update Paysheets', 'Produce Payroll', 'Payroll Reports', 'Create PDF Earnings Statements', 'Review Payroll Error Messages', 'Review Paycheck', and 'Review Self Service Paycheck'. The 'Review Paycheck' option is currently selected. The main area shows search results for paychecks. A table with the following columns is visible: Company, Pay Group, Pay Period End Date, Off Cycle?, Page Nbr, Line Nbr, Separate Check Nbr, Form Identification, Paycheck Number, Empl ID, and Name. The 'Form Identification' column is highlighted with a red box, and its values are 'ADVICE', 'ADVICE', 'CHECK', 'ADVICE', and 'CHECK' for the first five rows. The table also includes a search bar at the top with 'Search' and 'Clear' buttons, and a 'View All' link. The page number '1-100 of 121' is shown at the bottom right of the table area.

Company	Pay Group	Pay Period End Date	Off Cycle ?	Page Nbr	Line Nbr	Separate Check Nbr	Form Identification	Paycheck Number	Empl ID	Name
	MON	03/31/2022	N	1	1	0	ADVICE			
	MON	03/31/2022	N	1	2	0	ADVICE			
	MON	03/31/2022	N	1	3	0	CHECK			
	MON	03/31/2022	N	2	1	0	ADVICE			
	MON	03/31/2022	N	2	2	0	CHECK			

# New Security Roles

## Grant Position Funding Report access to Position Management Roles

- Position Funding Reports (All Positions or Vacant Positions Only) – These reports include a listing of agency positions with relevant position details, as well as Commitment Accounting funding details for the position.
- Users with the following roles will now have access to run the Position Funding Reports.
  - TX\_HCM\_HR\_ESTABLISH\_POSITIONS
  - TX\_HCM\_HR\_MAINTAIN\_POSITIONS
  - TX\_HR\_UPD\_ESTABLISH\_POSITIONS
- **Navigation:** Payroll for North America > Payroll Distribution > Commitment Accounting USA > TX Position Funding Report

## Create role for Federally Funded Employee LAC reports

- **TX\_HCM\_TL\_FED\_FUND\_RPTS** - Provides access to run the Federal Funding Reports. These reports include employee level reported and payable time from the Time and Labor modules. Additionally, they include time reported to Labor Account Codes (LACs) used for time tracking.
- A security request for this role is required for non-TL Super User access.
- TL Super Users will continue to have access to this report from the Time and Labor Dashboard
- **Navigation:** Using the **Right NavBar** Time and Labor > Texas Reports > TL Federal Funding Reports
- Reference: SR 31322

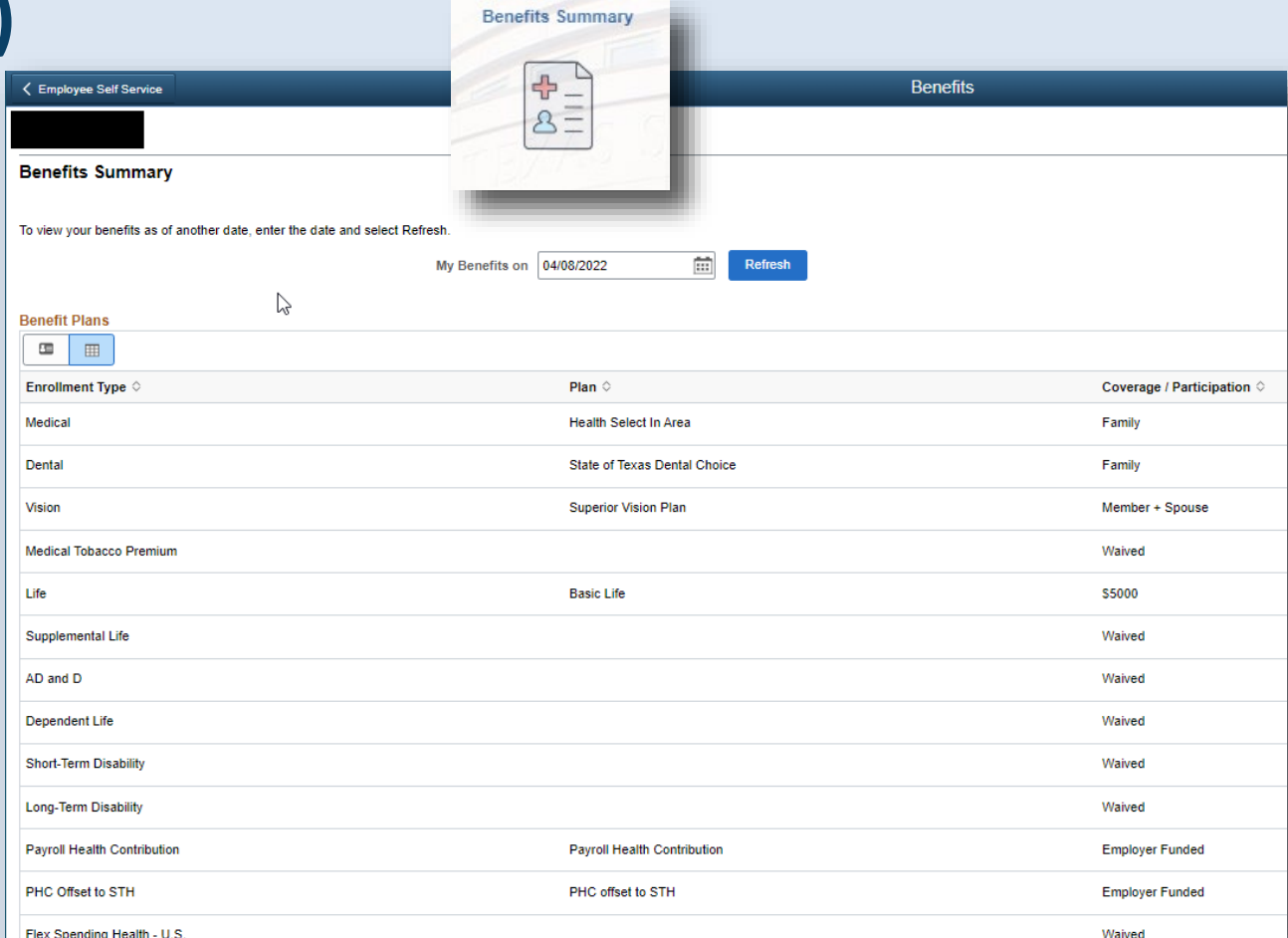
# New Access in Benefits

## Update Access to the Benefits Enrollment Role – Benefits Coordinators (TX\_HCM\_BN\_BENEFIT\_ENROLL)

- Add the new Benefit Summary Tile and page access.
  - Reference: SR 33151
- Add Paycheck View access.
  - Reference: SR 32852.

## Update Employee Self-Service Access

- Add the new Benefit Summary Tile and page access.
  - Reference: SR 33151
- No security requests are required.



The screenshot displays the 'Employee Self-Service' interface for 'Benefits Summary'. A floating tile titled 'Benefits Summary' is shown, featuring a calendar icon and a 'Refresh' button. Below the tile, the main page content includes a date selector for 'My Benefits on' set to '04/08/2022'. The 'Benefit Plans' section is presented as a table with the following data:

Enrollment Type	Plan	Coverage / Participation
Medical	Health Select In Area	Family
Dental	State of Texas Dental Choice	Family
Vision	Superior Vision Plan	Member + Spouse
Medical Tobacco Premium		Waived
Life	Basic Life	\$5000
Supplemental Life		Waived
AD and D		Waived
Dependent Life		Waived
Short-Term Disability		Waived
Long-Term Disability		Waived
Payroll Health Contribution	Payroll Health Contribution	Employer Funded
PHC Offset to STH	PHC offset to STH	Employer Funded
Flex Spending Health - U.S.		Waived



# Security Refinements

## Remove CAPPS Employee Search Page from CA Manager and Inquiry Roles

- Removed Employee Search Page from CA Inquiry Role and other Inquiry Roles that do not need access to SSN.
- The CAPPs Employee Search page access is granted to Payroll Processors via the TX\_HCM\_PY\_PAYROLL\_PROCESSOR role.
- A security request needs to grant access to the TX\_HCM\_HR\_UPD\_EMPLOYEE\_SEARCH role.
- Reference: SR 31322

## Corrected inquiry access to ORC and Task configuration pages

- Removed update access (from all inquiry roles) to ORC and Task configuration pages.
- Time and Labor super-users maintain access to update ORC and Task configurations.
- No security request is required.
- Reference: SR 31322.

# Updates to Reports

## Corrected the Off-Cycle Description on the SPRS Approval Documents Query (TX\_PY\_SPRS\_APPRVL\_DOC)

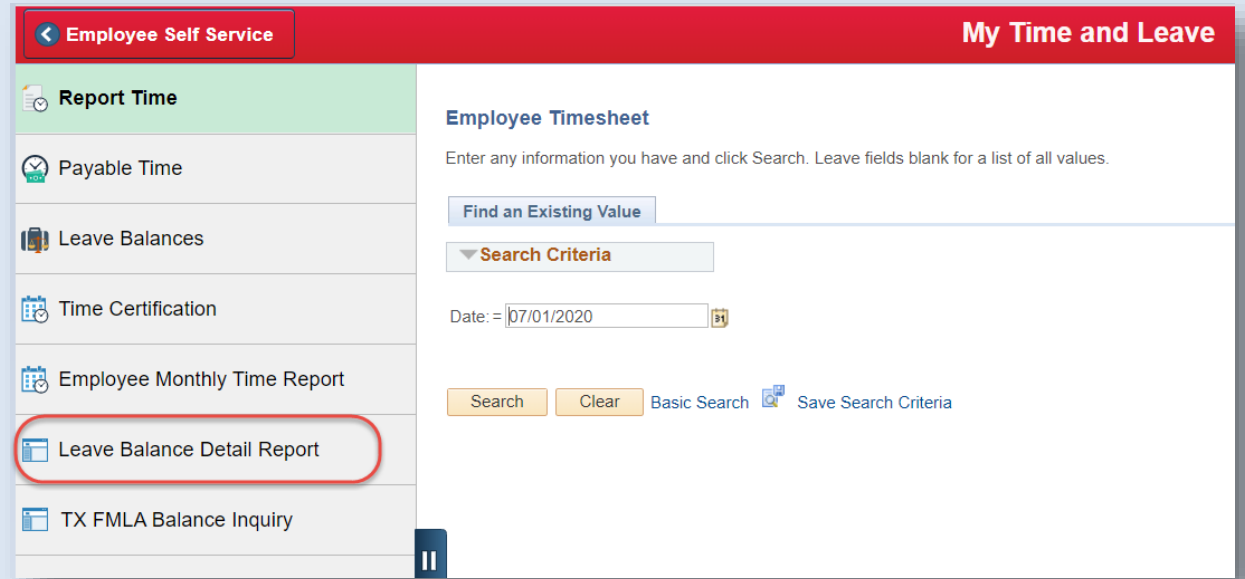
- The Y/N value was correct, but the decoded descriptive value was incorrect.
- Corrected so that **N** = On-Cycle and **Y** = Off-Cycle.
- Reference: SR 31353

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run						
Company = 507																
View All   Rerun Query   Download to Excel   Download to XML																
Row	Appr Call Type	Company	Approver	Approver Name	Document Number	Batch Type	Approval Response	Message Text	Date	Approval Time	Off Cycle	Off Cycle	Pay Group	Pay Period End	Status	Approval ID
1	APPROVE				81074001	Payments	0000	Approved	20210721	16443400	Off-Cycle	N	MON	07/31/2021	USAS Accepted	incorrect value. It should be = On-Cycle
2	APPROVE				81074002	Payments	0000	Approved	20210726	14340600	On-Cycle	Y	MON	07/31/2021	USAS Accepted	incorrect value. It should be = Off-Cycle
3	APPROVE				81076003	Payments	0000	Approved	20210803	11091100	On-Cycle	Y	MON	07/31/2021	USAS Accepted	incorrect value. It should be = Off-Cycle

# Updates to Reports ...(continued)

## Navigation updates for TL Reports

- Added the **Leave Balance Detail Report** to all Time and Labor fluid navigational tiles and reports were reordered (EE, MGR, TA, SU).
- The **Time Needs Approval Status Report** was added to the TL fluid navigational tiles and reports were reordered (TA, SU).
- Renamed the **HR Reports** Tile in Manager Self-Service now referred to as “**Reports.**”
- Agencies may need to review documentation for potential navigation updates (MGR).
- Reference: SR 31323



# Updates to Reports ...(continued)

## Updates to Pay Impacting Forms (PIF) Report

- Include new:
  - Vision plans (Type 14)
  - Flexible Spending Plans (Type 62)
  - Health Savings Plans (Type 67)
- Update to allow use for SMI Paygroup.
- Navigation: CAPPS Interfaces > Benefits > Reports.
- Reference: SR 2303.



# Thank You!

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