



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

## Management-to-Staff Ratio and Full-Time Employee Information Reports

**Note:** This Desk Aid was written to the specifications of CAPPs Central Agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

## TABLE OF CONTENTS

Overview .....	1
Running the Mgmt/Staff Ratio Report .....	1
Running the FTE Information Report .....	5
Revision History .....	8

# Management-to-Staff Ratio and Full-Time Employee Information Reports

## Overview

The Mgmt/Staff Ratio (MSR) Report and the Full-Time Equivalent (FTE) Information Report are used quarterly by agencies to self-report trend data to the State Auditor’s office related to FTEs who perform services for the state of Texas agencies.

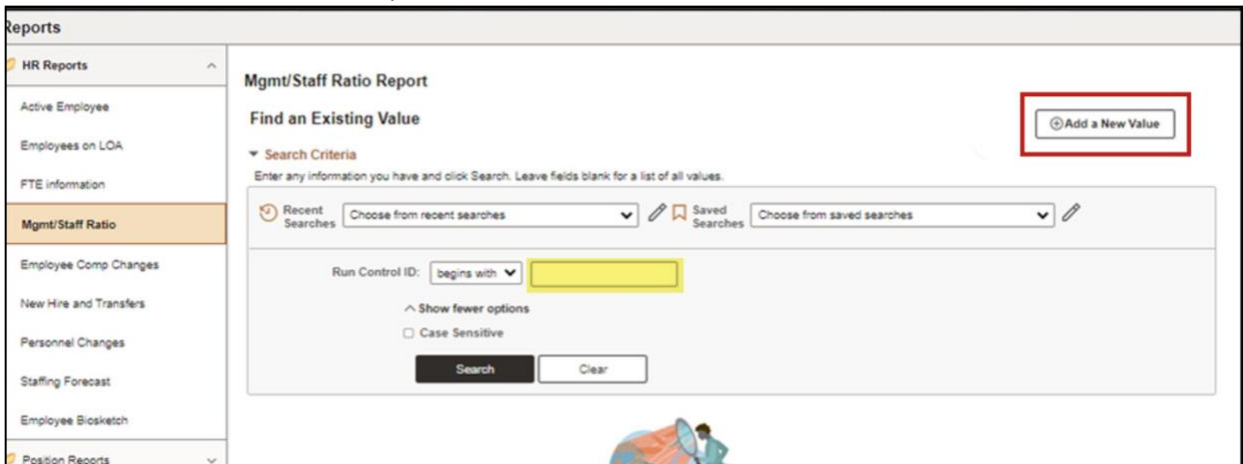
The user must have the TX\_HR\_UPD\_HR\_REPORTS role to have access to the reports located in the CAPPS **Workforce Administration** dashboard. Contact your agency’s security coordinator if the **HR Reports** tile is not available to you.

## Running the Mgmt/Staff Ratio Report

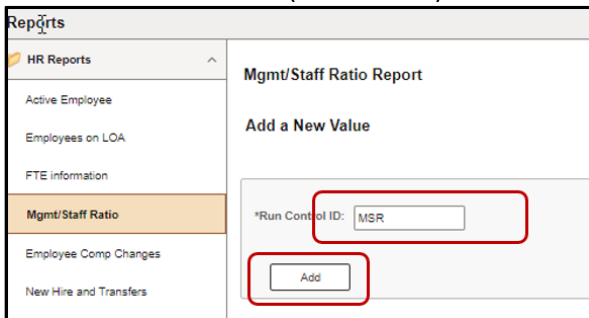
**Navigation**  
**Dashboard:** Workforce Administration; **Tile:** Reports, HR Reports, Mgmt/Staff Ratio

To run the management to staff ratio report, you must:

1. Search for an existing RUN CONTROL ID  
**–or–**  
 Select **Add a New Value** to set up a new **Run Control ID**.

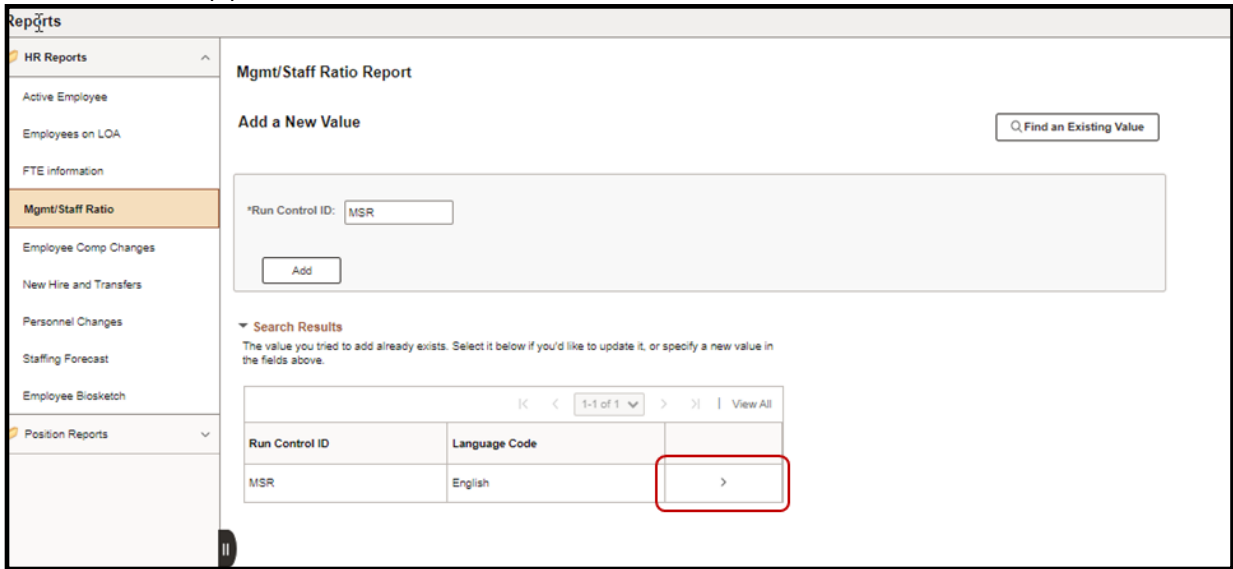


2. Enter the desired value (**MSR or FTE**) in the RUN CONTROL ID field.



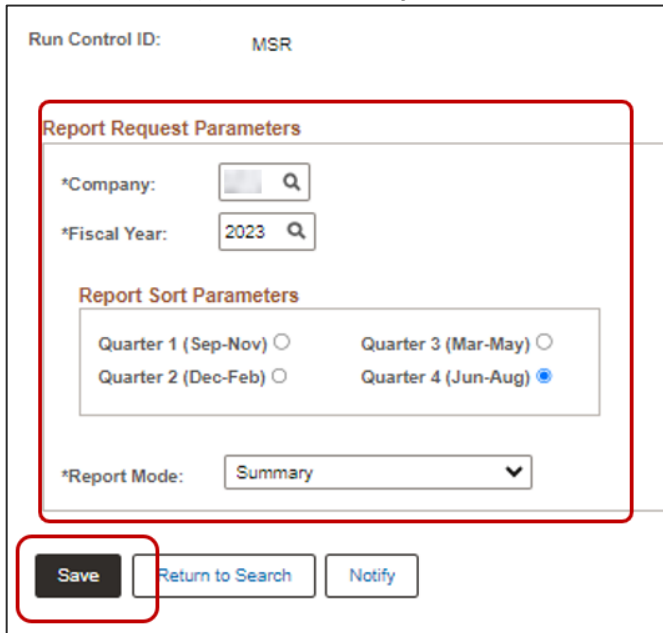
3. Select **Add**.  
 The search results window displays.

4. Select the arrow (>) to view the desired *Run Control ID*.



5. Enter the following mandatory fields to define the **Report Request Parameters**:

- COMPANY
- FISCAL YEAR
- QUARTER (select the radio button to designate the report sort quarter)
- REPORT MODE (choose **Summary** or **Detail** from the dropdown menu)



6. Select **Save**.

7. Select **Run**.



The *Process Scheduler Request* page displays.

8. Select **PDF** for the *Format*.

The screenshot shows the 'Process Scheduler Request' dialog box. At the top, there are fields for 'User ID', 'Run Control ID' (MSR), 'Server Name', 'Run Date' (07/22/2024), 'Recurrence', 'Run Time' (11:48:21AM), and 'Time Zone'. Below these is a 'Process List' table with columns: Select, Description, Process Name, Process Type, Type, Format, and Distribution. The first row is selected, and the 'Format' dropdown is set to 'PDF'. At the bottom left, the 'OK' button is highlighted with a red arrow.

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	MSR Process and Report	TX_MSR_PRC	BI Publisher	Web	PDF	Distribution

9. Select **OK**.  
The process instance number displays.

10. Select **Process Monitor** to check the status of the process.

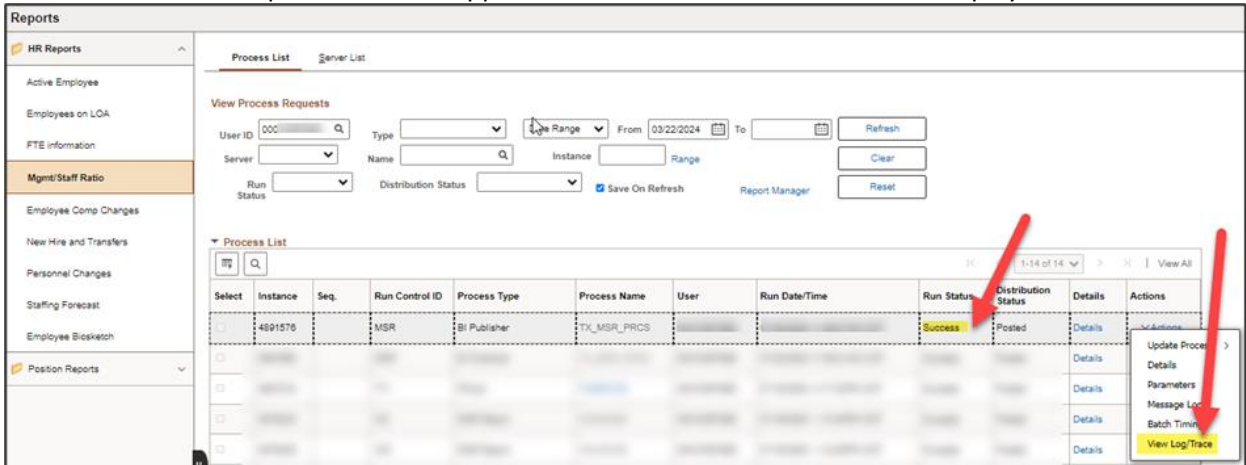
The screenshot shows the 'Reports' page with the 'Management/Staff Ratio Report' selected. The 'Process Monitor' button is highlighted with a red arrow. The report parameters are: Run Control ID: MSR, Report Manager, Process Instance: 4891568. Below are 'Report Request Parameters' (Company, Fiscal Year: 2023) and 'Report Sort Parameters' (Quarter 4 (Jun-Aug) selected). At the bottom are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

11. Select **Refresh** until the RUN STATUS displays **Success** and DISTRIBUTION STATUS indicates **Posted**.

The screenshot shows the 'Process List' table with columns: Select, Instance, Seq., Run Control ID, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, Details, and Actions. The first row has Instance 7891576, Run Control ID MSR, Process Type BI Publication, User 0000X, Run Date/Time XXXX/20XX 12:58:23PM CDT, Run Status Success, and Distribution Status Posted. The 'Refresh' button and the 'Success' status are highlighted with red boxes.

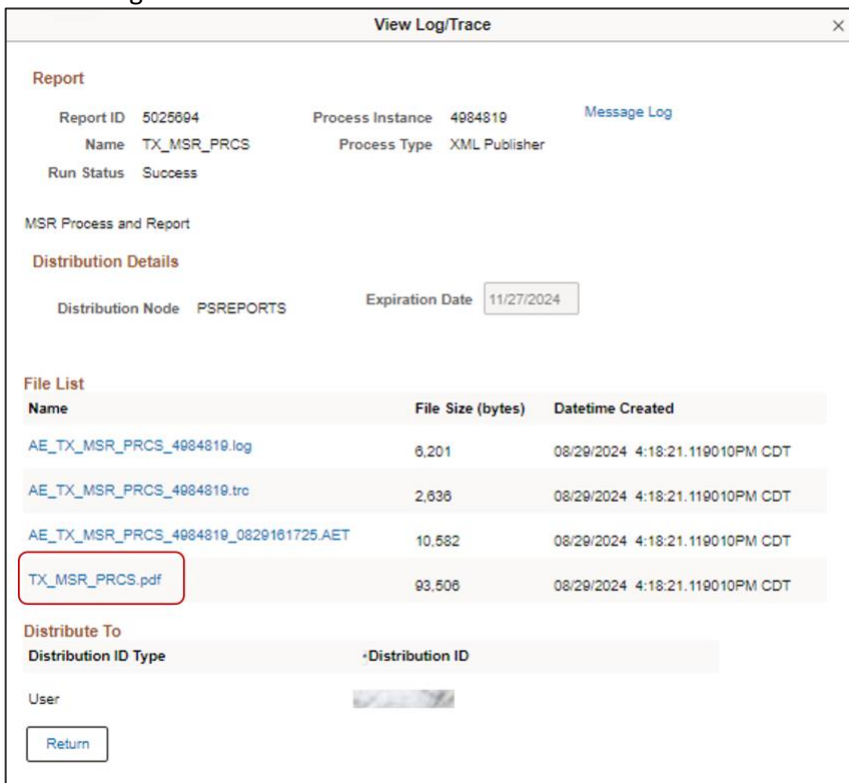
Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	7891576		MSR	BI Publication		0000X	XXXX/20XX 12:58:23PM CDT	Success	Posted	Details	Actions

12. Select the **Actions** drop-down for the applicable row once **Success** and **Posted** displays.



13. Select the **View Log/Trace** action.  
The *View Log/Trace* pop-up window displays.

14. Select the generated PDF file from the **File List**.



Once selected, the report displays in a new window.

## Running the FTE Information Report

### Navigation

**Navbar:** Workforce Administration, CAPPS Reports, Mgmt/Staff Ratio Report or FTE Information

**Dashboard:** Workforce Administration; **Tile:** Reports, HR Reports, FTE Information

To run the full time employee information report, you must:

1. Set up the Run Control by searching for an existing RUN CONTROL ID  
 –or–  
 Selecting **Add a New Value** to set up a new **Run Control ID**.
2. Enter the desired value (**MSR or FTE**) in the RUN CONTROL ID field.
3. Select **Add**.  
 The search results window displays.
4. Select the arrow (>) to view the desired **Run Control ID**.
5. Enter mandatory fields to define the **Report Request Parameters**:
  - COMPANY
  - FISCAL YEAR
  - QUARTER (select the radio button to designate the report sort quarter)
  - SELECT OUTPUT (choose **Agency Level**, **Fund Level** or **PCA Level** from the dropdown menu)

6. Select **Save**.

7. Select **Run**.

- Select **PDF** as the report **FORMAT**.

**Process Scheduler Request**

User ID: 000 [redacted] Run Control ID: FTE

Server Name: [dropdown] Run Date: 07/22/2024 [calendar icon]

Recurrence: [dropdown] Run Time: 12:01:51PM [button: Reset to Current Date/Time]

Time Zone: [dropdown]

**Process List**

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	TXFTERPT	TXFTERPT	Application Engine	Web [dropdown]	<b>PDF</b> [dropdown]	Distribution

[button: OK] [button: Cancel]

- Select **OK**.

- Select **Process Monitor**.

**Reports**

HR Reports

- Active Employee
- Employees on LOA
- FTE information**
- Mgmt/Staff Ratio
- Employee Comp Changes
- New Hire and Transfers
- Personnel Changes
- Staffing Forecast
- Employee Biosketch

Position Reports

**FTE Information Report**

Run Control ID: FTE [button: Report Manager] [button: Process Monitor] [button: Run]

**Report Request Parameters**

\*Company: 305 [dropdown] \*Select Output: Agency Level [dropdown]

\*Fiscal Year: 2023 [dropdown]

**Report Sort Parameters**

Quarter 1 (Sep-Nov) [radio] Quarter 3 (Mar-May) [radio]  
 Quarter 2 (Dec-Feb) [radio] Quarter 4 (Jun-Aug) [radio]

[button: Save] [button: Return to Search] [button: Notify] [button: Add] [button: Update/Display]

- Select **Refresh** until the **RUN STATUS** displays **Success** and **DISTRIBUTION STATUS** indicates **Posted**.

**Reports**

HR Reports

- Active Employee
- Employees on LOA
- FTE information**
- Mgmt/Staff Ratio
- Employee Comp Changes
- New Hire and Transfers
- Personnel Changes
- Staffing Forecast
- Employee Biosketch

Position Reports

**Process List** [button: Server List]

**View Process Requests**

User ID: [dropdown] Type: [dropdown] Date Range: [dropdown] From: 09/22/2024 To: [calendar icon]

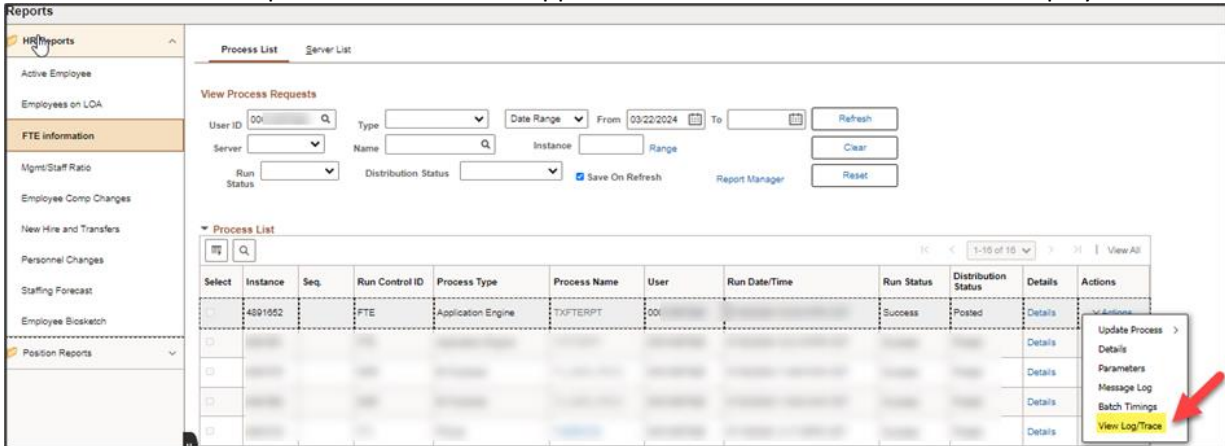
Server: [dropdown] Name: [dropdown] Instance: [dropdown] Range: [dropdown]

Run Status: [dropdown] Distribution Status: [dropdown] [checkbox: Save On Refresh] [button: Refresh] [button: Clear] [button: Reset]

**Process List**

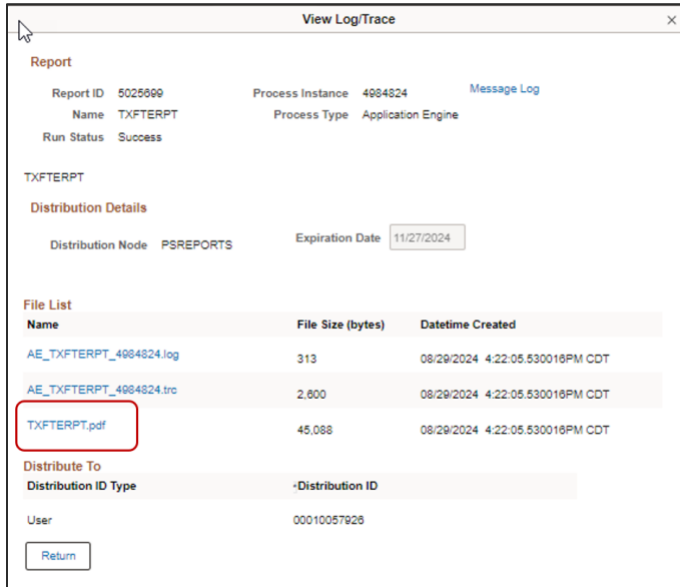
Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	4891652		FTE	Application Engine	TXFTERPT	0000X	XXXXX20XX 12:58:23PM CDT	<b>Success</b>	<b>Posted</b>	Details	Actions

12. Select the **Actions** drop-down menu for the applicable row once **Success** and **Posted** displays.



13. Select the **View Log/Trace** action.  
The *View Log/Trace* pop-up window displays.

14. Select the generated PDF file from the **File List**.



Once selected, the report displays in a new window.

## Revision History

Date	Description of Change	Changed By
Aug. 16, 2024	Initial release.	G. Banata