

Fluid User Interface

CAPPS HR/Payroll
User Group Meeting

March 2018

Attention:

The following slides represent a DRAFT version of intended Fluid UI functionality in CAPPS and is not intended to serve as a training document. Use of the information in this document for training or planning purposes is discouraged.

Fluid UI:

What is Fluid? PeopleSoft applications are now rendered in a responsive design that enables users to access them across form factors from smart phones to tablets to laptops or desktops. It also provides navigation that is simpler, more efficient, and more intuitive.

Why are we making the switch to Fluid? For many reasons! Users will be able to enjoy the benefits of having the pages they access most often available on a mobile device. Also, the user experience, no matter the device, is greatly enhanced. In addition, Oracle will begin dropping support for their Classic pages after the Fluid equivalent is rolled out.

Fluid UI (cont'd):

How does this impact my agency? Fluid will be rolled out during the FY18 CAPPs Deployment. Current CAPPs agencies will need to UAT test the new pages during the regular Deployment UAT period. You will also need to prepare users at your agency for the new look and feel of Fluid.

Will the whole look of the system change at once? No! CAPPs is using a selective adoption method to phase in Fluid. The FY18 Deployment is Phase I of the move to Fluid, and will only include Employee and Manager Self Service, along with some small changes to Portal.

Fluid UI - Portal

The Portal will undergo a few changes

The screenshot displays the CAPPs (Centralized Accounting and Payroll/Personnel System) portal. At the top left is the CAPPs logo. Below it are navigation links for 'Favorites' and 'Main Menu'. A welcome message and the date/time '11/09/2017 9:13 AM' are shown. The central area features a grid of service buttons: 'My Time & Leave', 'Employee Separation', 'My Pay', 'My Profile', 'Manager Self-Service', and 'Time & Leave Approval'. Below these is a 'Career Section (CAPPs Internal Candidates)' with four 'Agency Internal Career Section' links. On the right, there are news sections for 'HR / Payroll News & Articles' and 'Financials News & Articles', each with a 'Feed' link and a 'News' link.

Fluid UI – Portal (cont.)

What aspects of the Portal will change? The biggest change in the portal will be that you will no longer use the blue buttons to navigate to the CAPPS Core and CAPPS Reporting environments. You will now access those environments from the ‘Main Menu’ navigation.

This means that, when accessing the CAPPS Core or CAPPS Reporting applications, you will never leave the Portal.

Fluid UI – Portal (cont.)

The screenshot displays the Capps portal interface. At the top left is the Capps logo with the tagline "Centralized Accounting and Payroll/Personnel System". To the right is a search bar with a dropdown menu set to "All". Below the search bar is a navigation bar with "Favorites" and "Main Menu" dropdowns. The "Main Menu" dropdown is open, showing a list of folders and documents. The "HR/Payroll" folder is highlighted in yellow. Below the main menu, a "Welcome" message is visible. On the right side, there is a news section titled "HR / Payroll News & Updates" with a sub-heading "IMPORTANT: People" and a "Feed" button.

capps
Centralized Accounting and Payroll/Personnel System

All Search

Favorites Main Menu

Welcome

- HR/Payroll
- Manager Self-Service
- Enterprise Components
- Portal Administration
- PeopleTools
- Set HR Accessibility Fla
- My Instant Messaging
- Change My Password
- My Personalizations
- My System Profile
- Maintain Password Hint

- CAPPS Interfaces
- Consolidated Utilities
- Self Service
- Manager Self Service
- Time Admin Self Service
- Recruiting Center
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Time and Labor
- Payroll for North America
- Payroll Interface
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring

HR / Payroll News & Updates

IMPORTANT: People

As a part of the upgra
may have this set to p
your Agency CAPP

Feed

HR News

Fluid UI – Navigation Collections

What happens when I select a grey self service button?

Selecting a grey self service button will now redirect you to the Fluid navigation collection for the button you chose.

The screenshot displays the CAPPs (Centralized Accounting and Payroll/Personnel System) interface. At the top left is the CAPPs logo and name. To the right is a search bar with a dropdown menu set to 'All'. Below the search bar is a navigation bar with 'Favorites' and 'Main Menu' dropdowns. A 'Welcome' message is visible. The main content area features a vertical stack of grey buttons: 'My Time & Leave', 'Employee Separation', 'My Pay', 'My Profile', 'My Performance Management', 'Manager Self-Service', and 'Time & Leave Approval'. A red arrow points to the 'My Pay' button. On the right side, there is a section titled 'HR / Payroll News & Articles' containing a news item about a PeopleTools upgrade and a link to 'HR News'.

Fluid UI – Navigation Collections (cont.)

Selecting the grey 'My Pay' self service button now redirects to an employee pay navigation collection, which includes things like paycheck stubs and compensation history.

The screenshot displays a payroll self-service interface. On the left is a navigation menu with options like 'Paychecks', 'W-4 Tax Information', and 'View Compensation History'. The main area shows a 'Paychecks' table with the following data:

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay
12/01/2017	Comptroller of Public Accounts	11/01/2017 11/30/2017	[Redacted]
11/01/2017	Comptroller of Public Accounts	10/01/2017 10/31/2017	[Redacted]
10/02/2017	Comptroller of Public Accounts	09/01/2017 09/30/2017	[Redacted]
09/01/2017	Comptroller of Public Accounts	08/01/2017 08/31/2017	[Redacted]

Fluid UI – Navigation Collections (cont.)

Employees can now select any of the Payroll options on the left navigation bar and the page will display in the main content area.

The screenshot displays a web application interface for payroll management. On the left is a vertical navigation bar with a dark blue header containing a back arrow and the text 'Back'. Below the header, the navigation items are: 'Paychecks' (highlighted in yellow), 'W-4 Tax Information', 'W-2/W-2c Consent' (highlighted in green), 'View Form 1095-C', 'Form 1095-C Consent', 'View W-2/W-2c Forms', 'View/Edit Direct Deposit', 'Voluntary Deductions', 'View Compensation History', and 'Charity Deductions'. A blue 'Hamburger' menu icon is visible at the bottom of the navigation bar. The main content area has a dark blue header with the text 'Payroll'. The page title is 'W-2/W-2c Consent'. Below the title, there is a message: 'You currently receive W-2 or W-2c forms electronically'. A paragraph of text follows: 'You have consented to receive electronic W-2 and W-2c forms. If you prefer to receive paper W-2 and W-2c forms, you must submit a withdrawal of consent form. consent form.' Below this text is a yellow-bordered box containing a checkbox and the text 'I withdraw my consent to receive W-2 or W-2c forms electronically'. At the bottom of the main content area is a green 'Submit' button.

Fluid UI – Navigation Collections (cont.)

Will we access everything in self service through navigation collections? No. Not all pages have been incorporated into Fluid navigation collections yet, which means that some pages will continue to be accessed in the Classic layout that employees are familiar with using.

For those pages, employees may continue to navigate using the folder structure that they accustomed to today.

The screenshot displays the Capps interface. At the top left is the Capps logo with the tagline "Centralized Accounting and Payroll/Personnel System". At the top right, it says "PIHTST4 - Test Environ". Below the logo is a search bar with "All" and "Search" options, and an "Advanced Search" link. A navigation bar shows "Favorites", "Main Menu", and "Manager Self-Service". Under "Main Menu >", there is a folder icon for "Manager Self-Service". Below this, a grid of navigation items is shown:

Hire Candidate Hire Candidate	View Employee Personal Info. MSS View Employee Personal Info
Designate Workflow Alternate Designate Workflow Alternate	Maintain Employee's Work Info Manage Work Location and Reports to for your employees.
Performance Management Plan, evaluate and manage performance and development for your workforce.	Separations and Retirement Maintain Separations and Retirement for Employees

Fluid UI – Fluid Pages

I noticed that, in addition to the navigation collections, the pages looked different. Will all pages be different? Most self service pages will. As part of the move to the Fluid UI, many of the pages in CAPPs will now have a different look and feel. The content should remain virtually the same while the page has a new style. The next several slides will show examples of new page styles.

Fluid UI – Fluid Pages (Contact Details)

[← Back](#) Personal Details

- Addresses
- Contact Details**
- Name
- Emergency Contacts
- Additional Information
- Release Indicators/CPO
- BRP Enrollment

Contact Details

Phone

[+](#)

Number	Extension	Type	Preferred	
		Home	✓	>

Email

[+](#)

Email Address	Type	Preferred	
Chelsa.Vinklarek@cpa.texas.govxx	Business	✓	>

||

Fluid UI – Fluid Pages (Release Indicators)

< Back Personal Details

- Addresses
- Contact Details
- Name
- Emergency Contacts
- Additional Information
- Release Indicators/CPO**
- BRP Enrollment

Information Release Indicator

Chelsa Vinklarek Commissioned Peace Officer:

You may allow or deny public release of your home address, home telephone number, Social Security Number, emergency contacts, and family member information. NOTE: If the Commissioned Peace Officer is checked, you cannot update this information. Please contact your HR Administrator for assistance.

Use the Info Release check boxes of Yes/No indicators to allow release of all information, no information, or some information. The Info Release Check boxes are required and must be entered. Select save after making your choice.

Release All Information: Release all of this information (If selected all items below will be marked as "Yes")

Release No Information: Do not release any of this information (If selected, all items below will be marked as "No")

I allow the following to be released to the public :

- *Home Address:
- *Home Telephone Number:
- *SSN release:
- *Family Member Information:
- *Emergency Contact Information:

Fluid UI – Fluid Pages (Leave Balances)

[← Back](#) Time

- Report Time
- Payable Time
- Leave Balances**
- Time Certification
- Monthly Time Report

Leave Balances

Leave Balances Summary (In Hours)

Leave Type	Balance
ADMINLEAVE	>
ANNUALLEAV	>
BANKEDOVRT	>
COMPTTIME	>
DISASTRCMP	>
DSSASTRCMP	>
EDONATESCK	>
EXTDSICKLV	>
FITNESSLV	>
HOLIDAYCMP	>

Fluid UI – Fluid Drill Down

How do I drill down further into the information that's displayed? If there is additional information, or additional actions to be taken, for any information that is displayed, an arrow (>) will display to the right of the data. Just select that arrow and CAPPS will take you to the next level down or to the actionable item.

The screenshot shows a mobile application interface with a dark blue header containing a '< Back' button on the left and the word 'Time' on the right. A sidebar on the left lists several menu items: 'Report Time', 'Payable Time', 'Leave Balances' (highlighted in green), 'Time Certification', and 'Monthly Time Report'. The main content area is titled 'Leave Balances' and contains a 'Leave Balances Summary (In Hours)' table. The table has two columns: 'Leave Type' and 'Balance'. The rows are: ADMINLEAVE, ANNUALLEAV, BANKEDOVRT, COMPTTIME, and DISASTRCMP. Each row has a right-pointing arrow (>) in the 'Balance' column. A red arrow points to the arrow in the first row (ADMINLEAVE), which is also enclosed in a red square.

Leave Type	Balance
ADMINLEAVE	>
ANNUALLEAV	>
BANKEDOVRT	>
COMPTTIME	>
DISASTRCMP	>

Fluid UI – Fluid Drill Down (cont.)

In this example, when the arrow beside 'ADMINLEAVE' is select, the employee will be taken to a page displaying the details about the leave type.

The screenshot displays a Fluid UI interface with a dark blue header containing a '< Back' button on the left and the word 'Time' on the right. A vertical sidebar on the left contains five menu items: 'Report Time', 'Payable Time', 'Leave Balances' (highlighted in yellow), 'Time Certification', and 'Monthly Time Report'. The main content area is titled 'Leave Balances' and includes a 'Return to Leave Balances' link. It lists several metrics for the 'ADMINLEAVE' plan, all with a value of 0.000000. Below this is a 'Leave Information' table with one row showing 'Expiration Date' and 'Number of Hours Expiring'. A note at the bottom explains that the 'Taken Fiscal Year to Date Balance' includes all approved timesheet entries, while the 'Earned Fiscal Year to Date Balance' includes only those approved before today's date.

Leave Balances	
Today's Date	03/21/2018
Last Update	11/23/2017
Leave Time Off Plan	ADMINLEAVE
Beginning Fiscal Year Balance	0.000000
Earned Fiscal Year to Date Balance	0.000000
Taken Fiscal Year to Date Balance	0.000000
Adjusted Fiscal Year to Date Balance	0.000000
Pending Approval	0.000000
Available Balance	0.000000

Leave Information		1 row
Expiration Date	Number of Hours Expiring	
		0.000000

The Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year.
The Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

Fluid UI – Additional Features

Collapsible Left Navigation Bar – The left navigation bar can be collapsed in order to display more of the main content on the screen. Need to navigate somewhere else? Simply click the tab to bring back the navigation bar.

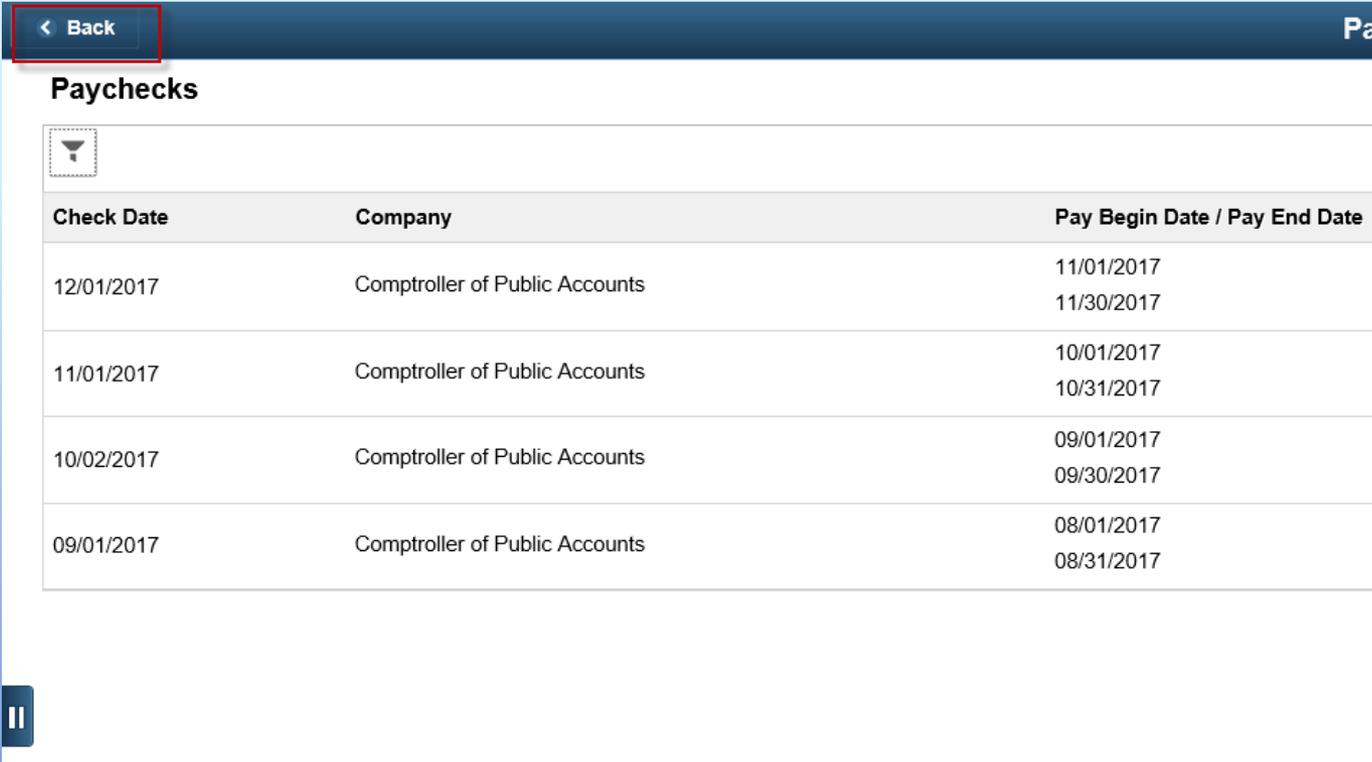
The screenshot displays a web application interface with a dark blue header and a light blue background. The left navigation bar is partially collapsed, showing a list of menu items. A red box highlights a blue button with a white double-line icon (collapse/expand) on the navigation bar. The main content area shows a 'Paychecks' page with a table of data. A second red box highlights a similar blue button on the bottom right of the page.

Paychecks

Check Date	Company	Pay Begin Date / Pay End Date
12/01/2017	Comptroller of Public Accounts	11/01/2017 11/30/2017
11/01/2017	Comptroller of Public Accounts	10/01/2017 10/31/2017
10/02/2017	Comptroller of Public Accounts	09/01/2017 09/30/2017
09/01/2017	Comptroller of Public Accounts	08/01/2017 08/31/2017

Fluid UI – Additional Features

Back Button – All Fluid pages will include a ‘Back’ button above the left navigation bar. This button will redirect the user back to the Portal home page.



The screenshot displays a user interface for 'Paychecks'. At the top left, a dark blue navigation bar contains a white arrow pointing left and the text '< Back', which is highlighted with a red rectangular box. To the right of this bar, the text 'Pa' is partially visible. Below the navigation bar, the title 'Paychecks' is centered. Underneath the title is a filter icon (a funnel) inside a dashed square. Below the filter is a table with three columns: 'Check Date', 'Company', and 'Pay Begin Date / Pay End Date'. The table contains four rows of data. At the bottom left of the page, there is a dark blue button with two white vertical bars (a pause or refresh icon).

Check Date	Company	Pay Begin Date / Pay End Date
12/01/2017	Comptroller of Public Accounts	11/01/2017 11/30/2017
11/01/2017	Comptroller of Public Accounts	10/01/2017 10/31/2017
10/02/2017	Comptroller of Public Accounts	09/01/2017 09/30/2017
09/01/2017	Comptroller of Public Accounts	08/01/2017 08/31/2017

Fluid UI – Upcoming Activities

When will these changes take place? Current CAPPs agencies will see these changes on July 9, 2018.

Will we be able to test the new Fluid UI? UAT will begin in May. Additional information will be given regarding UAT participation.

A live demo of the Fluid UI will be given at the April User Group meeting.



Thank you!

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