capps

## Centralized Accounting and Payroll/Personnel System

CAPPS Financials
Fluid Approval Tile

June 30, 2022

Overview

- Beginning July 5, 2022, as a result of the CAPPS *Image and Tools* upgrade, CAPPS Financials approvers will see the fluid ***Approvals*** tile on their dashboards.

- **The worklist will no longer be available to users or approvers.**

- The tile appears on all dashboards in CAPPS, including modules that are not using the approval workflow (examples: *Asset Management* and *Inventory*). This is to keep the fluid navigation consistent for all CAPPS modules and to avoid future customizations:

  - General Ledger
  - Account Payable
  - Purchasing
  - Suppliers
  - Travel and Expense
  - Asset Management
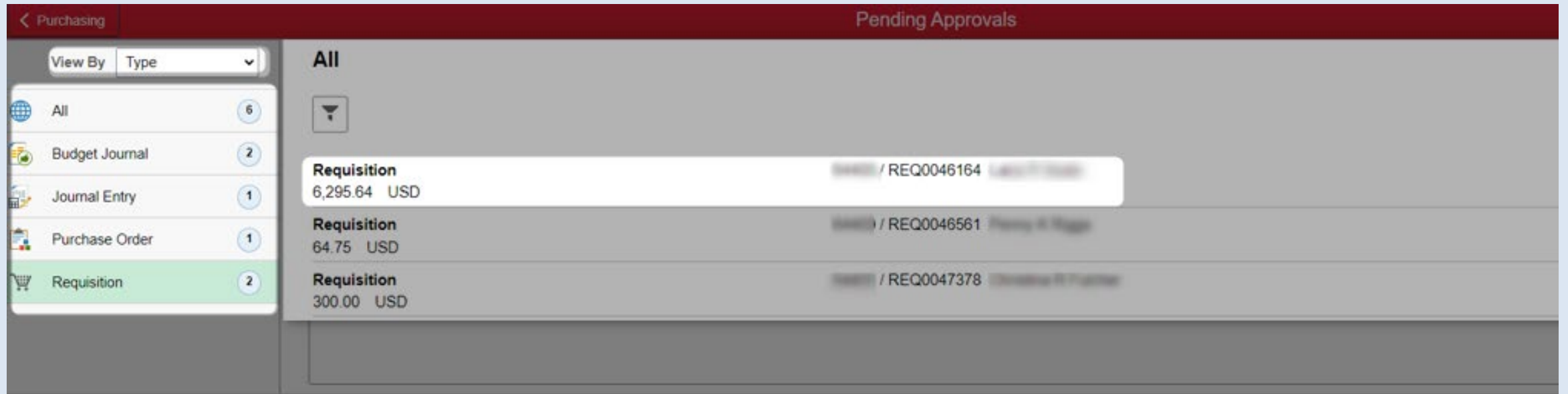 - Inventory
  - Project Costing
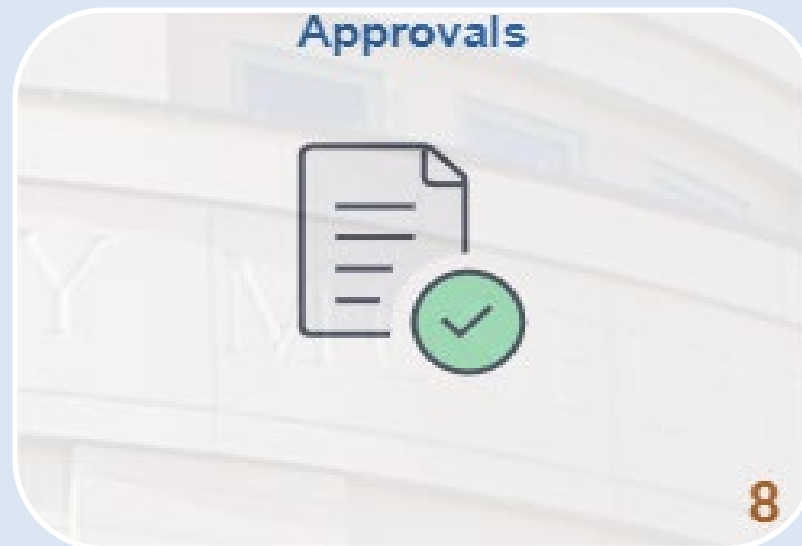
Fluid Approval: Features

- View line and distribution information.

- View printable versions, comments and attachments.

- Documents from any module pending user's approval are shown within the tile.

- User can view/filter to see only a specified type of transaction, i.e., requisitions, POs, journals, vouchers, etc.

- View approval chain.

- The number of documents pending user's approval is shown on the tile.

- Approver can Approve, Deny, Pushback (Level 2 or above) or Hold.

- Edit Purchase Order link (with security).

- Insert reviewers or approvers from the approval Chain.

Fluid Approval: Landing Page

- Document Types appear on the left-side navigation, by default.

- Can view by Type, From, Requestor and Date routed.

- Click on the document to drill down for additional information.

Fluid Approval: Drill Down

- Displays information such as comment, attachments and printable versions.
- Approve, Deny or Pushback.
- View Approval Chain.
- Drill Down from here to see *Schedule* and *Distribution* information.

Fluid Approval: View Attachments

Any attached files can be seen under *View Attachments*.

Fluid Approval: View Approval Chain

Select **Approval Chain** to see approvers, comments and details.

Fluid Approval: Start New Path

In the *Approval Chain* window, users can insert additional approvers or reviewers by selecting the **Start New Path** button.
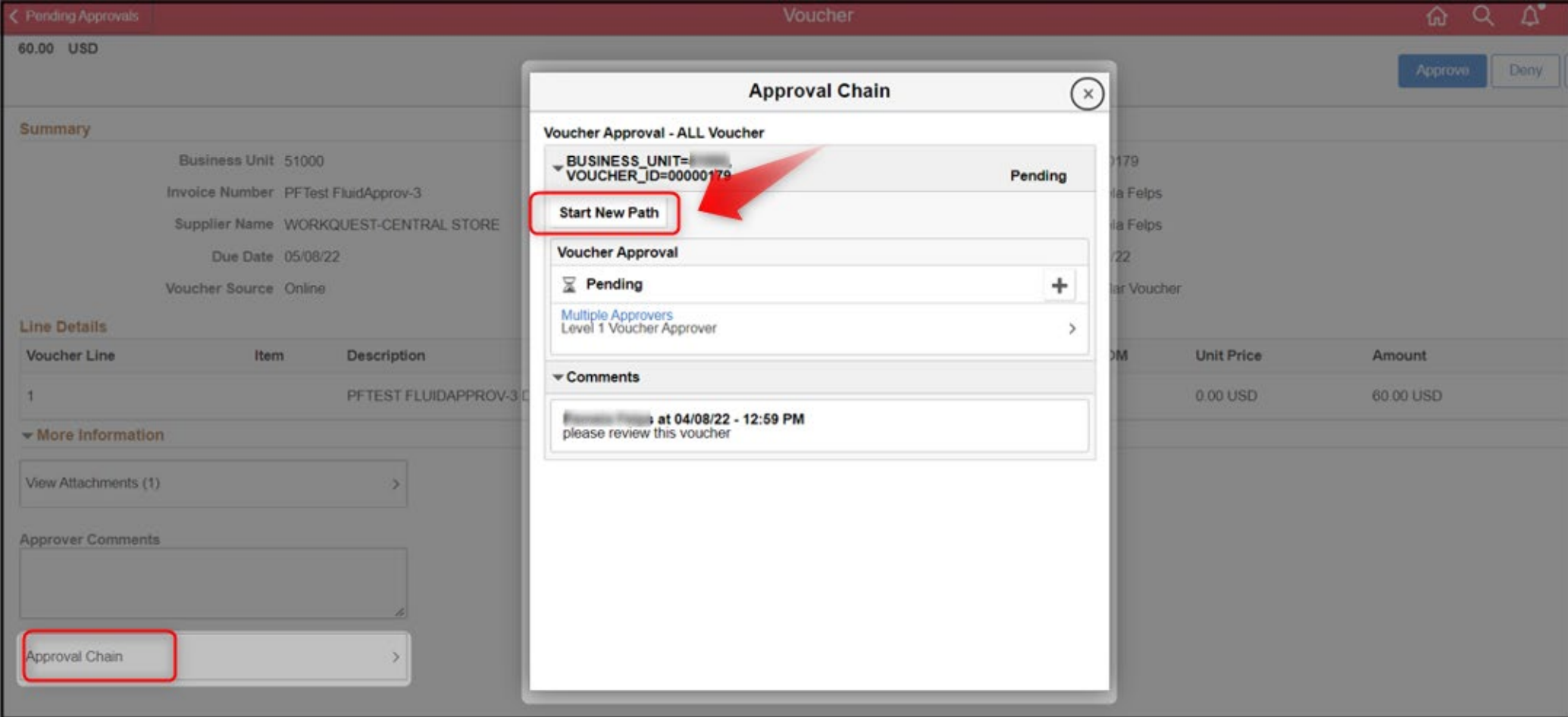
Fluid Approval: Insert Additional Approvers

When the *Start New Approval Path* window opens, users can add new reviewers or approvers by selecting the **User ID** and identifying if they are an *Approver* or a *Reviewer*.

Fluid Approval: Actions

An approver can *Approve, Deny, Pushback* or *Hold* the request. The *Pushback* option can only be used by a Level 2 or above.

Fluid Approval: Comments

Approver comments are **optional** on *Approval* but **required** for *Deny* or *Pushback.*

Thank You!

CAPPS Production Support Team