



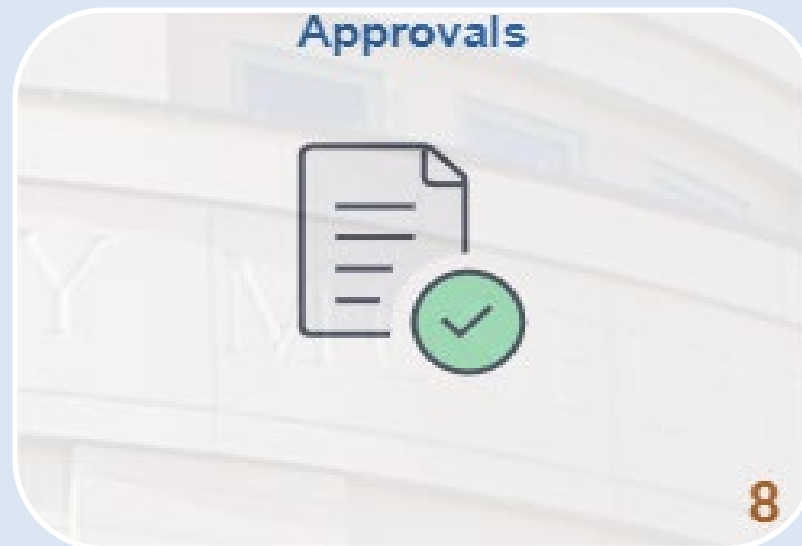
Centralized Accounting and Payroll/Personnel System

# **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

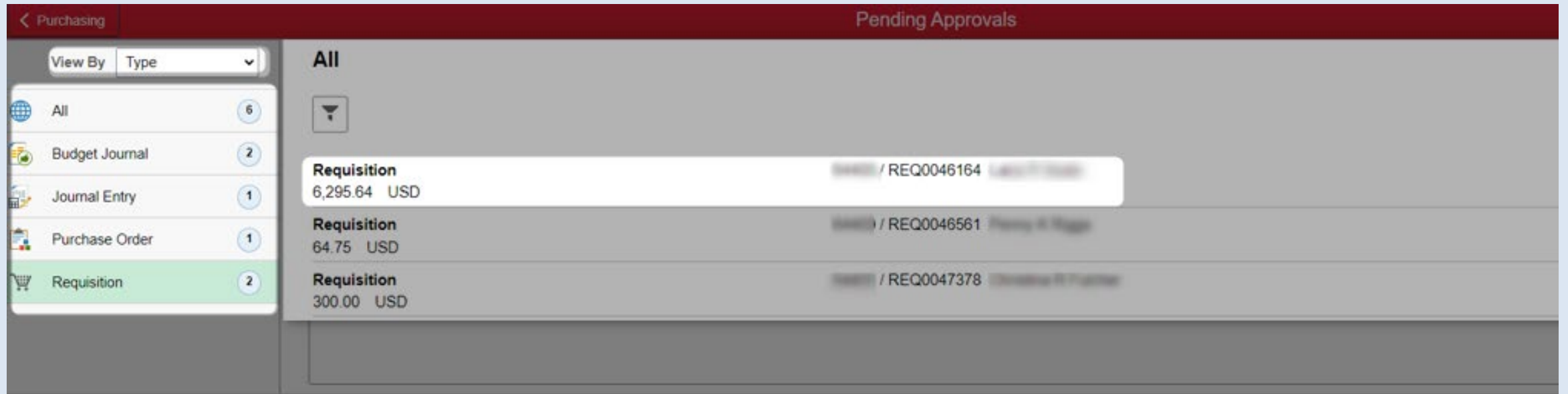


# Fluid Approval: Features

- 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.



The screenshot displays the 'Pending Approvals' interface within a 'Purchasing' context. On the left, a navigation menu lists document types: All (6), Budget Journal (2), Journal Entry (1), Purchase Order (1), and Requisition (2). The 'Requisition' item is selected. The main area shows a list of three requisitions, each with a 'Requisition' label, a value in USD, and a unique ID.

Document Type	Value	Document ID
Requisition	6,295.64 USD	REQ0046164
Requisition	64.75 USD	REQ0046561
Requisition	300.00 USD	REQ0047378

# 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.

**Request for APT test**  
2,601.00 USD

Header is pending your approval

**Summary**

Business Unit: 011000  
Routed Date: April 11, 2022  
Requester: Clayton B. Griffin  
Approval Justification: We have a lot of sorting to do

Requisition ID: R22004  
Requisition Date: April 11, 2022  
Entered by: Clayton B. Griffin  
Budget Header Status: Not Budget Checked

**More Information**

- Header comments and attachments
- View Printable Version

**Lines**

Line Number	Item Description	Merchandise Amount
1	Collating machine	2,601.00 USD

Approver Comments

Approval Chain

# Fluid Approval: View Attachments

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

**View Attachments**

Business Unit 51000  
Voucher ID 00000179

▼ Attachments

Sequence	Attached File	Attachment Description	Entered By
1	[redacted] _log.xlsx	supporting doc	Pamela Felps

Summary

60.00 USD

Business Unit 51000  
Invoice Number PFTes  
Supplier Name WORK  
Due Date 05/08/  
Voucher Source Online

Line Details

Voucher Line	Item
1	

More Information

View Attachments (1)

Approver Comments

Approval Chain

Amount  
60.00 USD

Approve Deny More

# Fluid Approval: View Approval Chain

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

**Approval Chain**

Voucher Approval - ALL Voucher

BUSINESS\_UNIT= [redacted]  
VOUCHER\_ID=00000179 Pending

Start New Path

Voucher Approval

Pending +

Multiple Approvers  
Level 1 Voucher Approver >

Comments

**Comments**  
Please review this voucher at 04/08/22 - 12:59 PM

**Summary**

60.00 USD

Business Unit 51000  
Invoice Number PFTest FluidApprov-3  
Supplier Name WORKQUEST-CENTRAL STORE  
Due Date 05/08/22  
Voucher Source Online

**Line Details**

Voucher Line	Item	Description
1		PFTEST FLUIDAPPROV-3

**More Information**

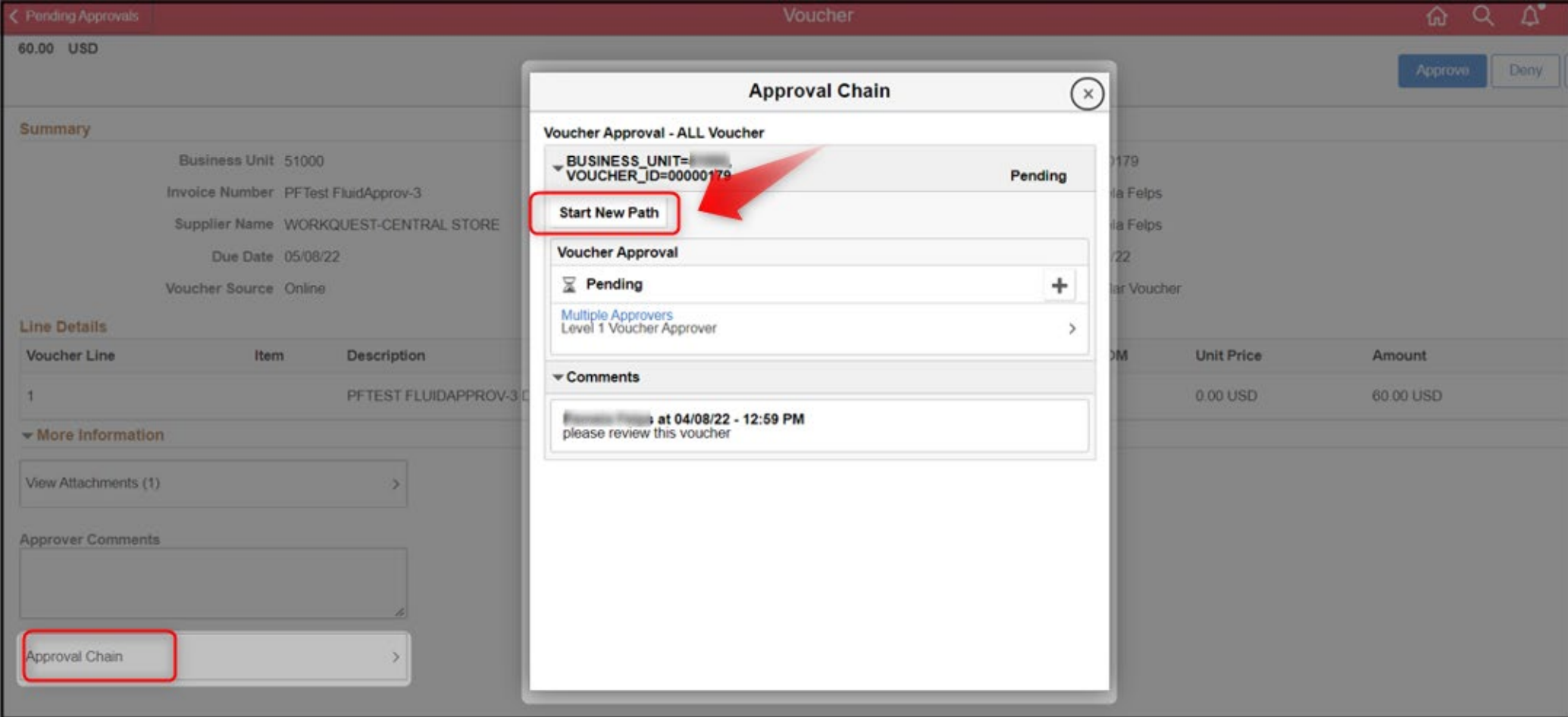
View Attachments (1) >

Approver Comments

Approval Chain >

# 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*.

The screenshot displays a mobile application interface for managing a voucher. The main screen, titled "Voucher", shows a pending approval for 60.00 USD. A modal dialog box titled "Start new approval path" is open in the foreground, allowing the user to add a new approver or reviewer. The dialog includes a search field for "User ID", radio buttons to select the role (Approver is selected), and an "Insert" button. The background screen shows a summary of the voucher with fields for Business Unit, Invoice Number (PFTest FluidApprov-3), Supplier Name (WORKQUEST-CENTRAL STORE), Due Date (05/08/22), and Voucher Source (Online). Below the summary is a table with columns for Voucher Line, Item, Description, Unit Price, and Amount. The table shows one line item with a unit price of 0.00 USD and an amount of 60.00 USD. There are also sections for "More Information" (View Attachments), "Approver Comments", and "Approval Chain".

Voucher Line	Item	Description	Unit Price	Amount
1		PFTEST FLUIDAPPROV-3	0.00 USD	60.00 USD

# 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.

The screenshot displays a mobile application interface for a Voucher approval screen. The top navigation bar is red and contains a back arrow, the text "Pending Approvals", the title "Voucher", and icons for home, search, notifications, and settings. Below the navigation bar, the voucher amount "60.00 USD" is displayed. On the right side, there are three buttons: "Approve" (blue), "Deny" (grey), and "More" (grey). The "More" button is open, showing a dropdown menu with two options: "Pushback" (grey) and "Hold" (white with a blue border). The main content area is divided into sections: "Summary" with fields for Business Unit, Invoice Number (PFTest FluidApprov-3), Supplier Name (WORKQUEST-CENTRAL STORE), Due Date (05/08/22), and Voucher Source (Online); Voucher ID (00000179), Created By, Modified By, Invoice Date (04/08/22), and Voucher Style (Regular Voucher). Below the summary is the "Line Details" section, which is a table with columns: Voucher Line, Item, Description, Quantity, UOM, Unit Price, and Amount. The table contains one row with Voucher Line 1, Item PFTEST FLUIDAPPROV-3, Description PFTEST FLUIDAPPROV-3 DESCR OF, Quantity 0, UOM, Unit Price 0.00 USD, and Amount 60.00 USD. Below the table is the "More Information" section, which includes a "View Attachments (1)" button, an "Approver Comments" text area, and an "Approval Chain" button.

# Fluid Approval: Comments

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

The screenshot shows a 'Voucher' approval interface. At the top, there is a navigation bar with a back arrow, 'Pending Approvals', and the title 'Voucher'. On the right side of the navigation bar are icons for home, search, notifications, and a menu. Below the navigation bar, the voucher amount '60.00 USD' is displayed. To the right of the amount are three buttons: 'Approve' (highlighted in blue), 'Deny', and 'More'. The main content area is divided into sections: 'Summary', 'Line Details', and 'More Information'. The 'Summary' section contains fields for Business Unit, Invoice Number (PFTest FluidApprov-3), Supplier Name (WORKQUEST-CENTRAL STORE), Due Date (05/08/22), and Voucher Source (Online). The 'Line Details' section is a table with columns for Voucher Line, Item, and Description. The 'More Information' section includes a 'View Attachments (1)' button, an 'Approver Comments' text area, and an 'Approval Chain' button. A modal dialog box titled 'Approve' is open in the center, with 'Cancel' and 'Submit' buttons. The dialog contains the text 'You are about to approve this request.' and a text area for 'Approver Comments' with the text 'I am approving this voucher.' entered.

**Summary**

Business Unit [redacted] Voucher ID 00000179  
Invoice Number PFTest FluidApprov-3 Created By [redacted]  
Supplier Name WORKQUEST-CENTRAL STORE Modified By [redacted]  
Due Date 05/08/22  
Voucher Source Online

**Line Details**

Voucher Line	Item	Description
1		PFTEST FLUIDAPPROV-3 DESCR

**More Information**

View Attachments (1) >

Approver Comments

Approval Chain >

**Approve** dialog box:

Cancel Approve Submit

You are about to approve this request.

Approver Comments

I am approving this voucher.

UOM	Unit Price	Amount
	0.00 USD	60.00 USD



# Thank You!

**CAPPS Production Support Team**