

Texas Military Department

New Capps Landing Page and Dashboards

Desk Aid



CONTENTS

OVERVIEW	2
Purpose	2
Background	2
NEW DASHBOARD APPEARANCE	3
CAPPS User log in and dashboard	3
NAVIGATION BAR	4
Fluid Navigation bar appearance	4
Navigation bar for different CAPPS Environments	5
NAVIGATOR	5
Accessing Navigator in CAPPS	5
Other Functionalities	7
Recent Places	8
Creating Favorites	8
Global Search	9
Home Button	12
EMPLOYEE SELF-SERVICE NAVIGATION BAR	12
Navigating ESS tiles	12
My Time and Leave	13
My Pay	14
My Profile	15
My Performance	16
HCM Common Links	16
MANAGER SELF-SERVICE LANDING PAGE	17
Navigating MSS tiles	18
Personal and Job Information	19
Time Management	20
HR Reports	22
FINANCIALS SELF-SERVICE NAVIGATION BAR	23
Navigating FIN tiles	23
FIN Workcenters	23
FIN Worklist	24
FIN Reporting	25
FIN Common Links	26
Navigation to FIN Modules	29
CORE APPLICATIONS	30
Recruit	31
Business Objects	31
Test Environments	32

OVERVIEW

PURPOSE

This document will demonstrate the new CAPPS landing page and new dashboard tiles as they will appear when users log in to the Centralized Accounting Payroll and Personnel System (CAPPS). It will assist users with understanding the new Unified Fluid Homepage and enabled Unified Navigator. The color of the Fluid Navigation Bar was also updated between production (PRD) and non-production (MNT, UAT, etc.) environments which allows the various CAPPS environments to be visually distinguishable.

BACKGROUND

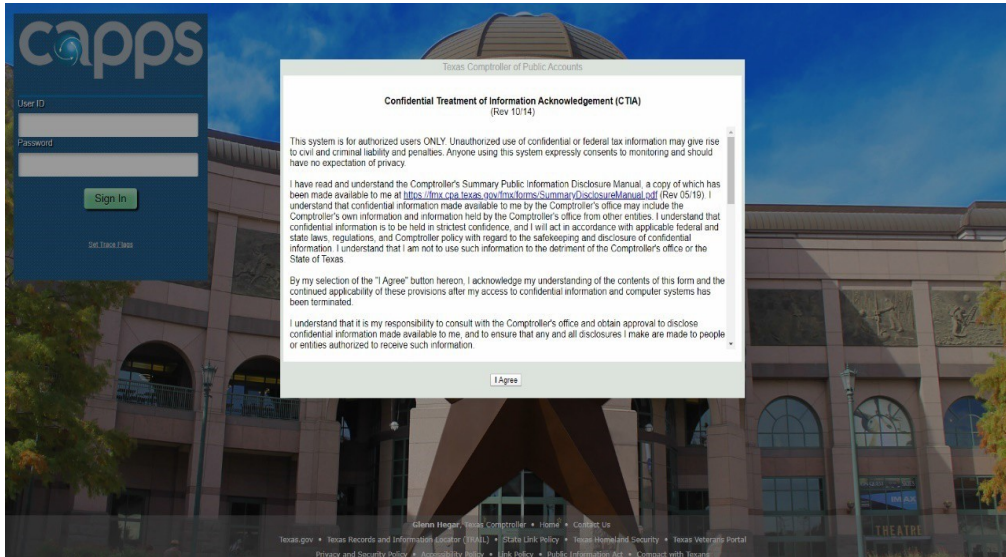
The new landing page configuration was modified to make the CAPPS application the default landing page for all Self-Service functionality and be the one location all users can access CAPPS applications via Single Sign-On.

Each dashboard will be driven by the security a user has and each tile displayed within the dashboard will be driven by what pages/components a user has access to in CAPPS. The default display will be the Employee Self-Service dashboard, which provides the common Employee Self-Service options for all. From this dashboard, access to core CAPPS applications will be determined by the user's CAPPS access.

NEW DASHBOARD APPEARANCE

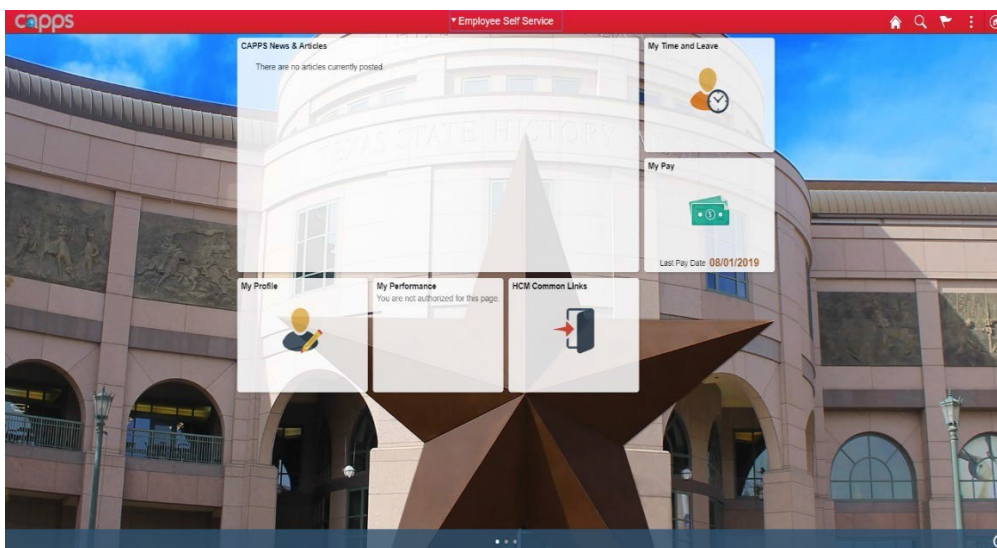
CAPPS USER LOGIN AND DASHBOARD

Users logging into CAPPS will see the following screen. Click “I Agree” to continue, then enter your User ID and password. Notice that the background has been updated and looks different than the previous portal login page.



Once successfully logged in, the Landing Page will default to the **Employee Self-Service dashboard**, as shown below. This will appear for all CAPPS Users, and will display the usual Employee Self-Service options. Users can access each option by clicking on the tile. When important information needs to be dispersed to all CAPPS users, it will be displayed in the **CAPPS News & Articles** section.

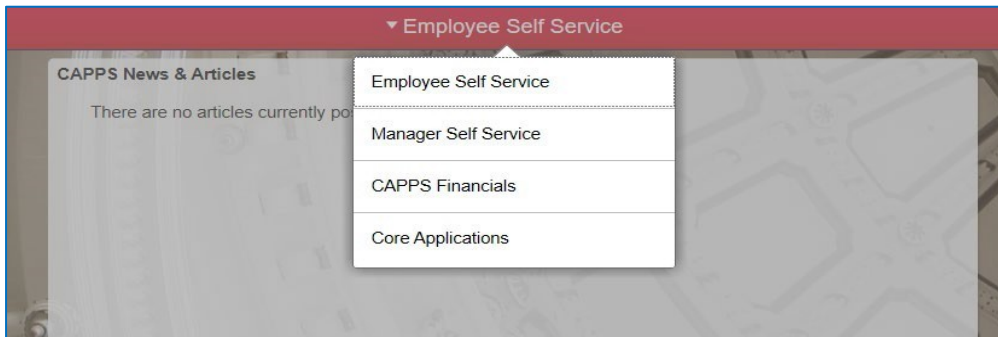
Note: The page will display according to the user's security access.



NAVIGATION BAR

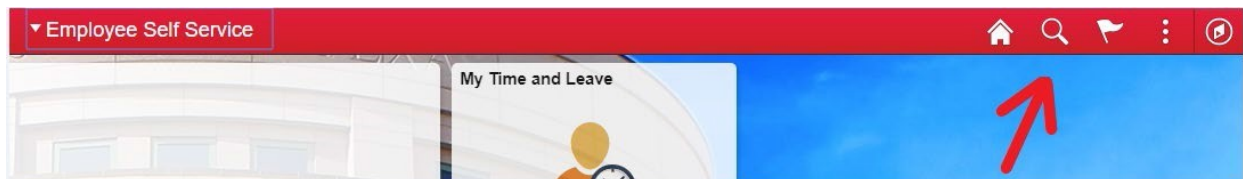
FLUID NAVIGATION BAR APPEARANCE






On the brightly colored navigation bar at the top of the screen, users will see a drop-down arrow. Click on **“Employee Self-Service.”** The drop-down options that appear will depend on users’ access. If users have access to Maintenance (MNT), User Acceptance Testing (UAT), and/or Business Objects (BOBJ), they will see a **“Core Applications”** option. If users have Financials access, they will see the **“CAPPS Financials”** option.



Take note of the top right corner of the page. There are various options to choose from, as shown in the icon list below.

Information for each of these options will be described later in this section.



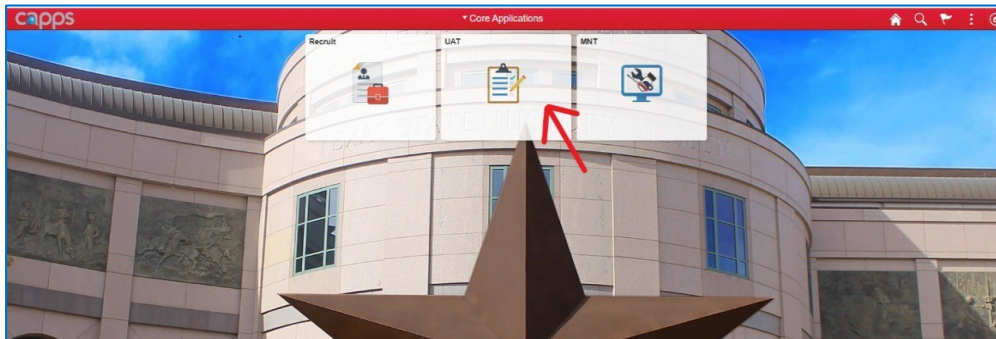
-  Home
-  Global Search
-  Notifications
-  Actions List (Add to Favorites / My Preferences / Sign Out)
-  NavBar (Recent Places / My Favorites / Navigator)

NAVIGATION BAR FOR DIFFERENT CAPPS ENVIRONMENTS

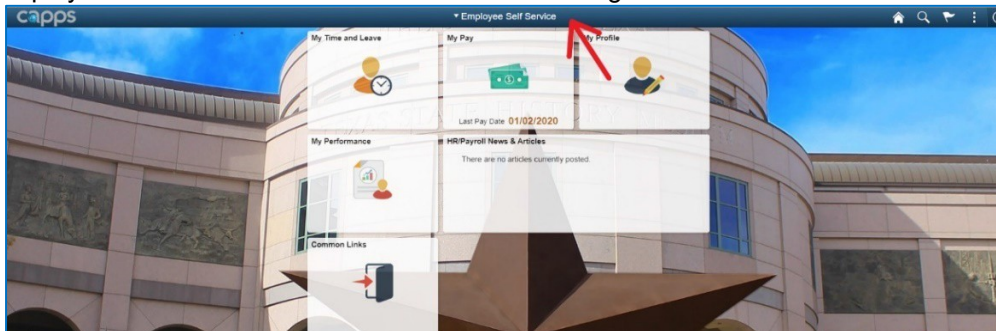
The color of the Fluid Navigation Bar was updated between production (PRD) and non-production environments. The Navigation Bar will be a different color depending on the CAPPS environment the user is logged into. Below are samples of what the production and non-production navigation bars color will look like.

Note: The red header at the top indicates that the user is in the production environment. The blue header at the top indicates that the user is in a non-production environment.

Click on the UAT environment tile.



A new window will open to a log in page. After logging into the UAT environment, the landing page will display as shown below. Notice the color of the navigation bar:

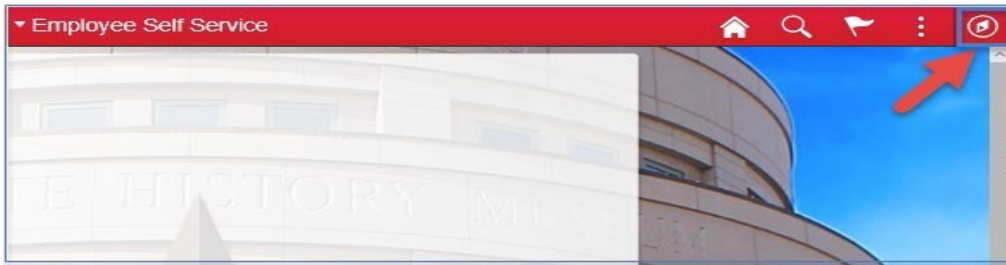


NAVIGATOR

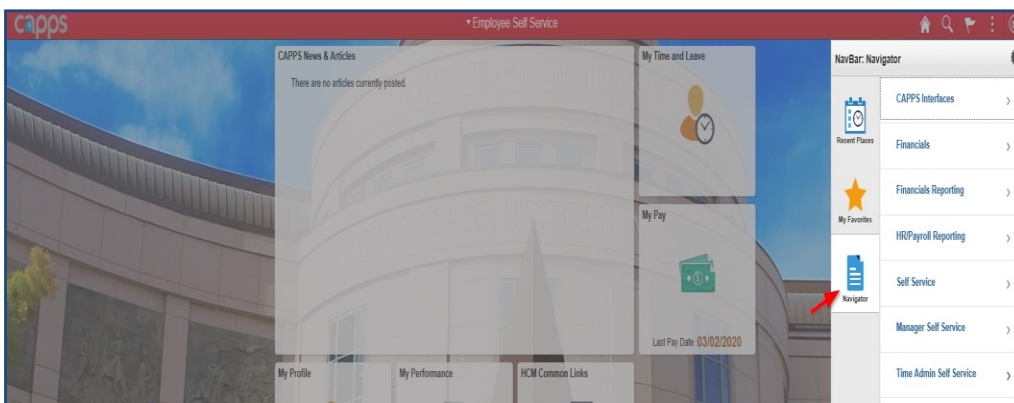
The CAPPS Navigator enables users to see workflow maps according to their hierarchical relationships. Users can browse the maps and navigate to individual pages by clicking the elements representing the pages.

ACCESSING NAVIGATOR IN CAPPS

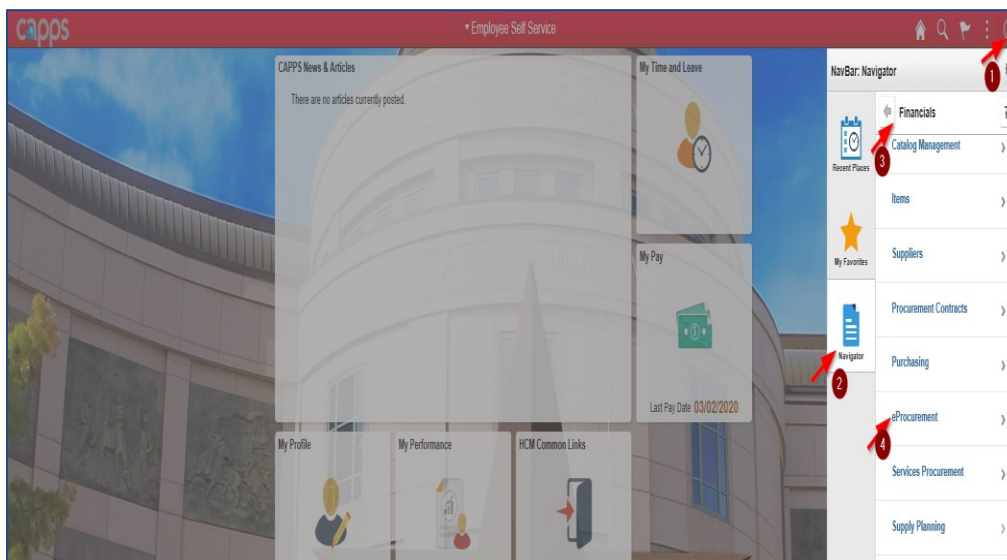
After logging into CAPPS, click the **NavBar** icon at the top right corner of page.

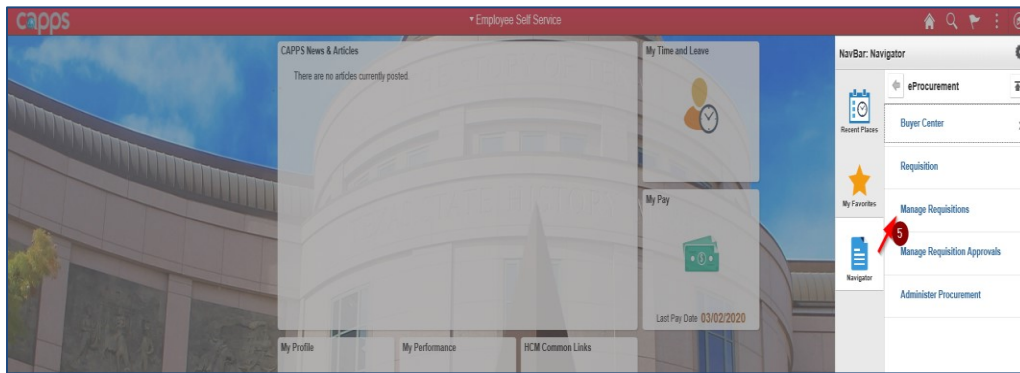


Click the **Navigator** button to view all the folders as shown below. Click the folders and sub folders to navigate to any pages. Note that the folders and sub folders displayed are dependent on user's security access.

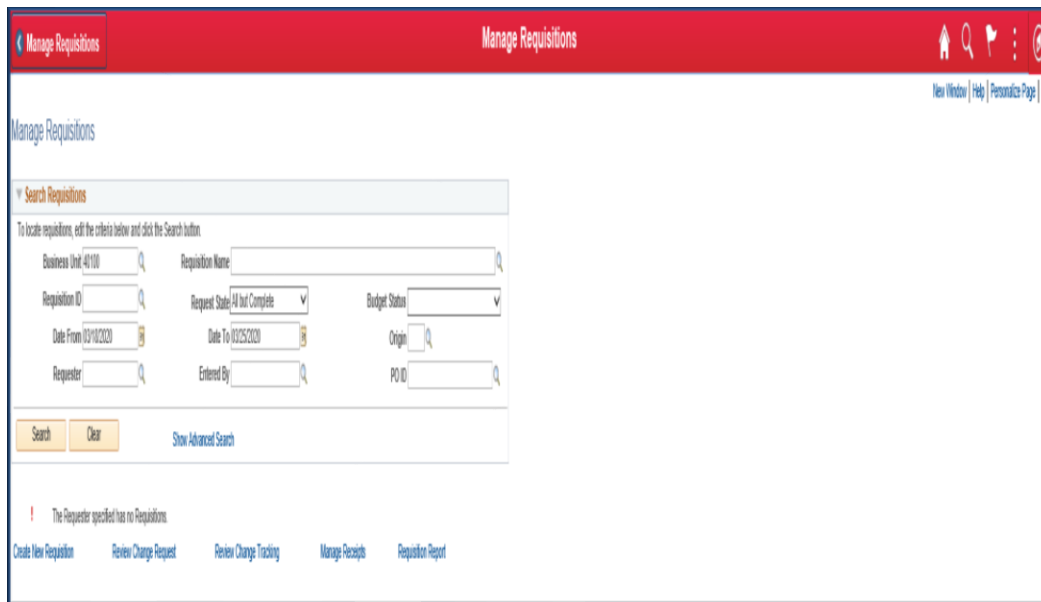


For our example, we will navigate to the **Manage Requisitions** page via the following path:
NavBar Icon > Navigator > Financials > eProcurement > Manage Requisitions






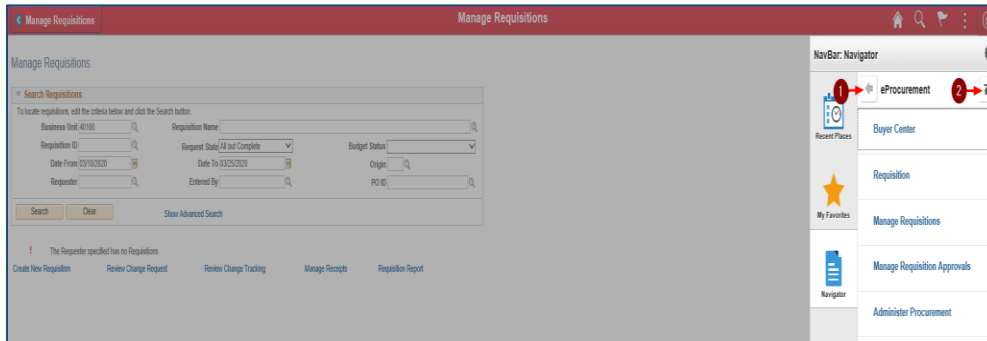
The system will navigate the user to the **Manage Requisitions** page.



OTHER FUNCTIONALITIES

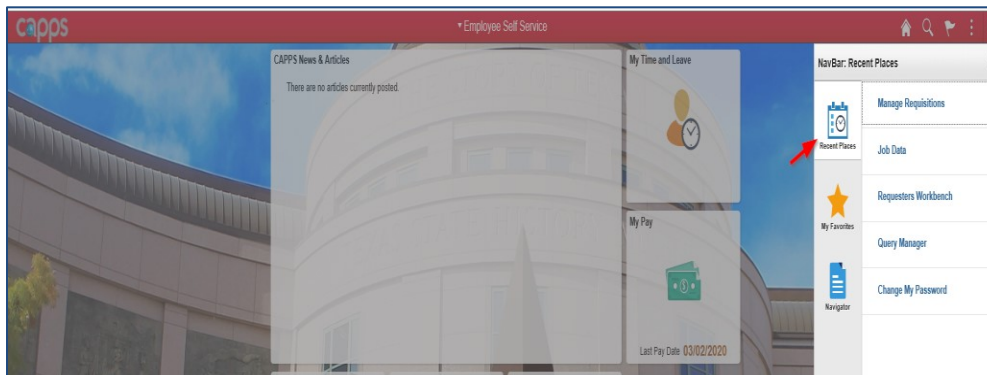
The  button will take users back to the root of navigation.

The  button will take users back one level.



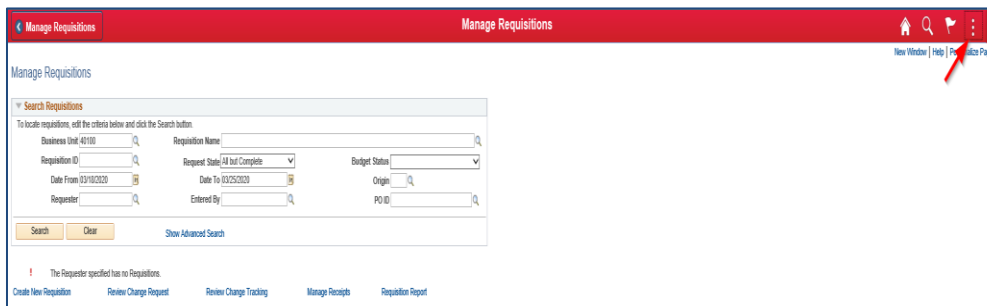
RECENT PLACES

The **Recent Places** button displays recently viewed pages.

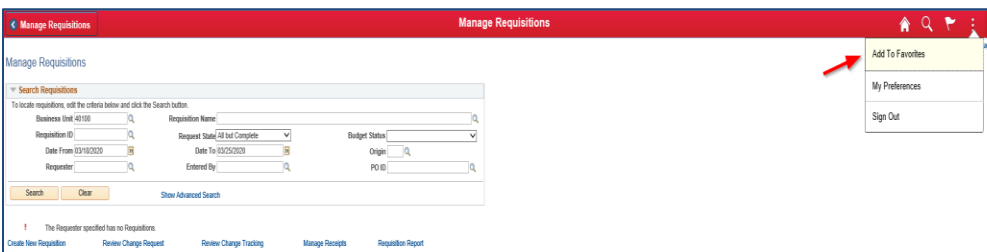


CREATING FAVORITES

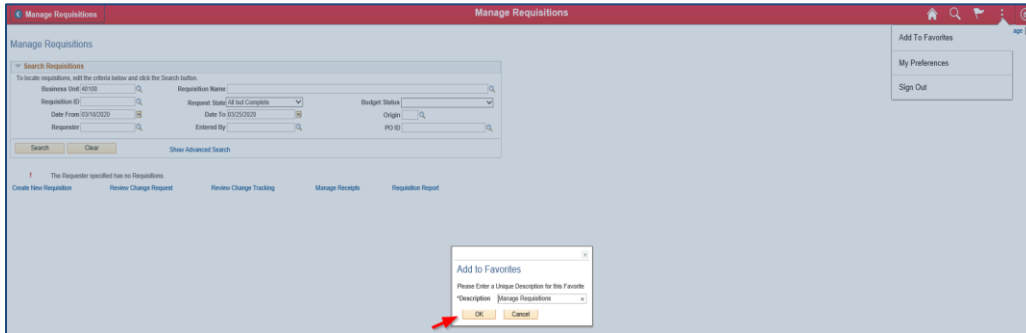
1. Click the **actions list** button as shown in the screenshot below.



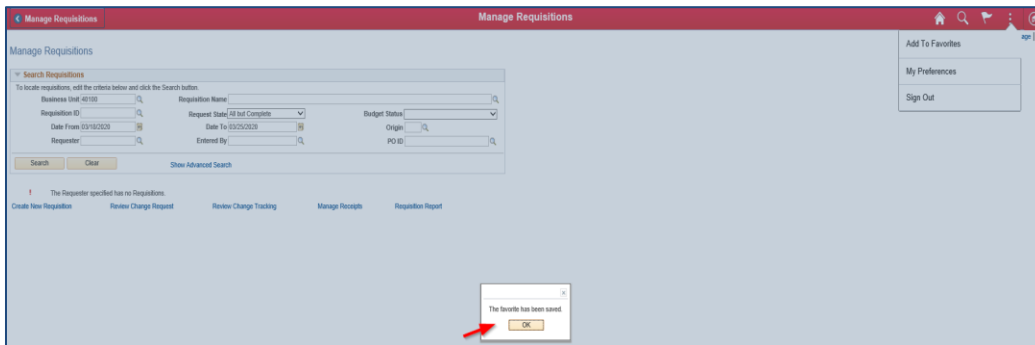
2. Click **Add to Favorites**.



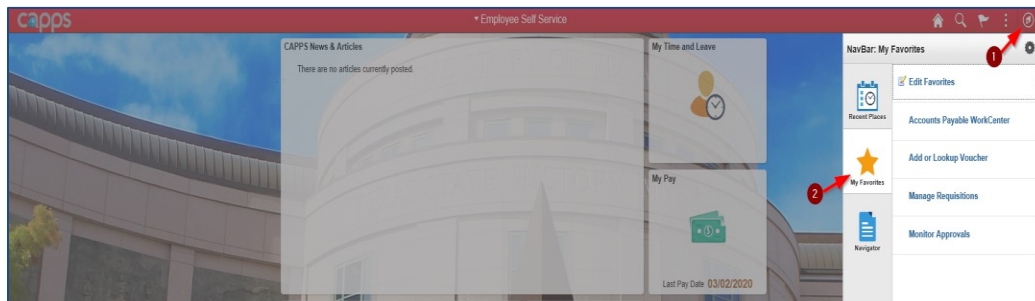
3. Change the **Description** if needed and click the **OK** button.



4. View the confirmation that the favorite has been saved, then click **OK**.



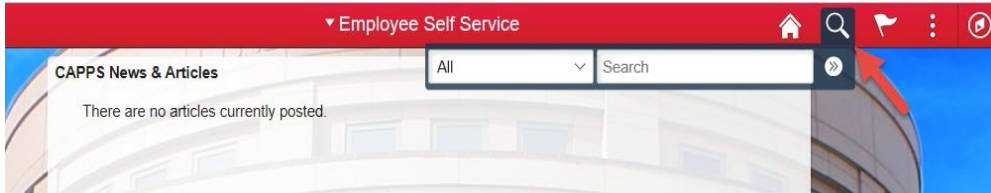
5. View favorites by clicking NavBar > **My Favorites** as shown below.



GLOBAL SEARCH

Click the search button at the top right of the page as shown below. The **Global Search** feature allows the user to search and drill down to specific CAPPs modules from the search results, without

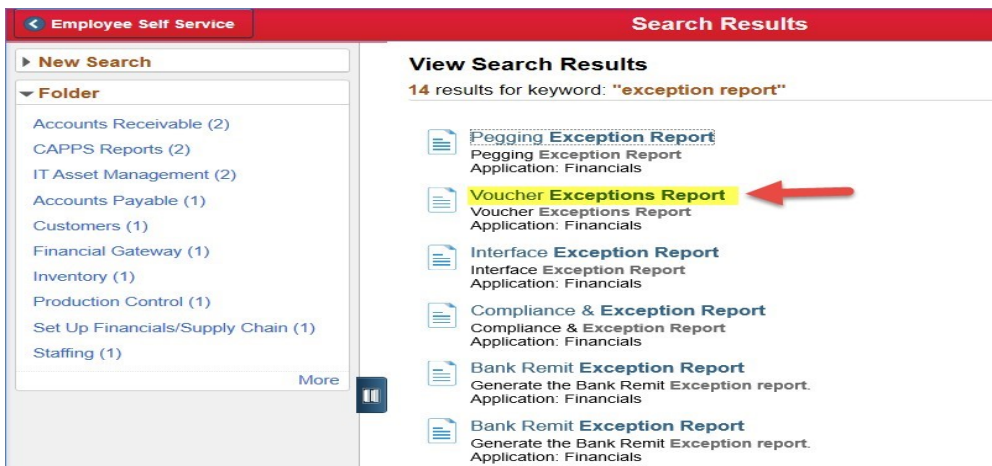
navigating through a menu list structure. The default setting on the Global Search is “All,” which includes reports for both Financials and HR/Payroll. To search only HR/Payroll reports, select “Navigator” from the dropdown menu; to search only Financials reports, select “Financials Navigator.”



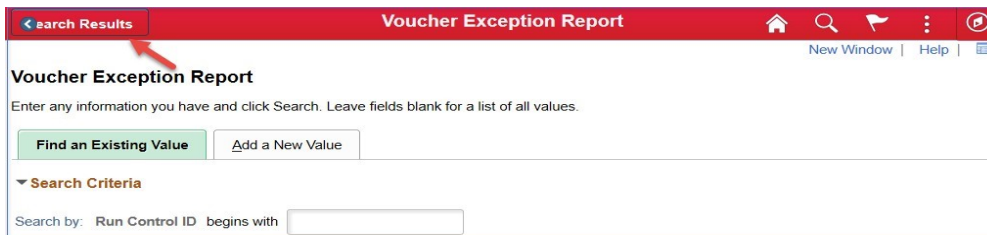
For our example, we will demonstrate searching for “**exception report**” in Capps Financials. Click on “>>” after entering search criteria.



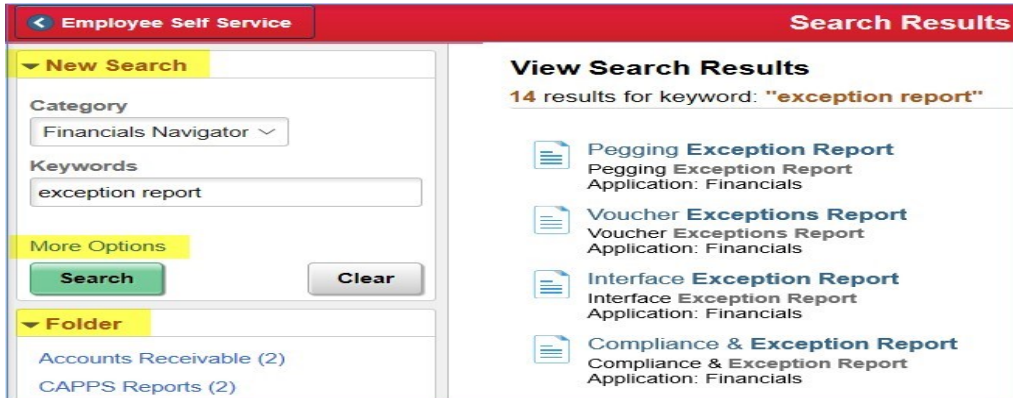
The following **search results** will be displayed. The user can click on any of the results to be directed to that module page.



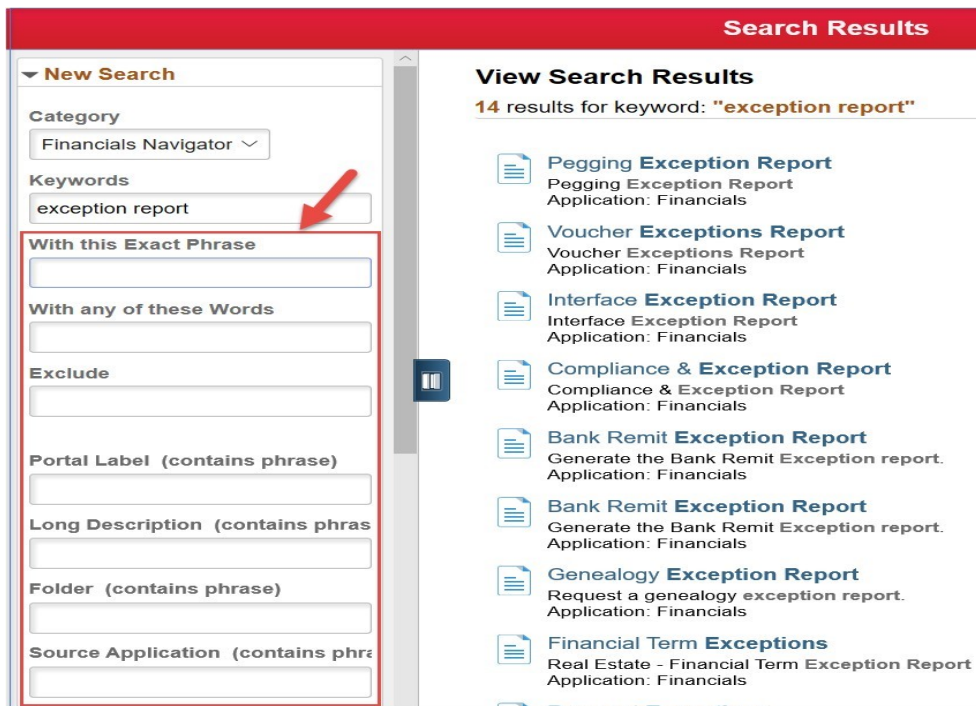
For our example, we clicked on **Voucher Exceptions Report**, which takes the user to that page. Notice the “**Search Results**” at the top left corner which includes the option to return to the previous search results page.



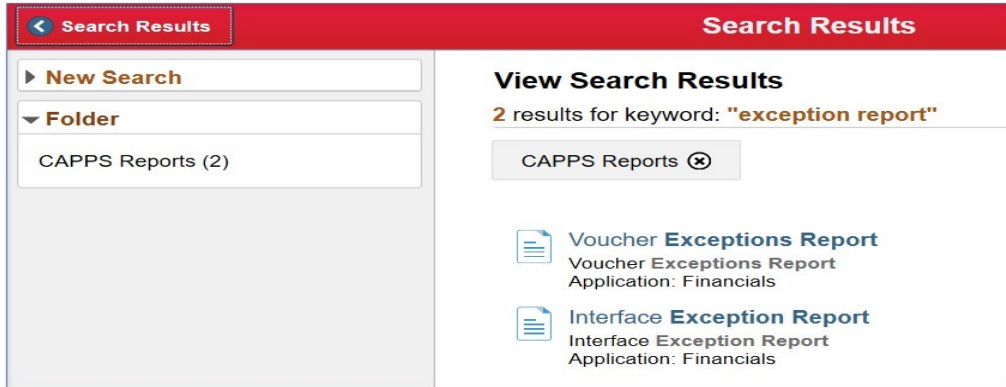
Also, on the search results page, notice the left-hand column. There are “**New Search**,” “**More Options**,” and “**Folder**” options that can be used to expand the global search.




When a user clicks on **“More Options,”** the following additional fields will be available to expand the search.



The **Folder** search feature allows a user to click on any of the folder results and see a list of all the related module pages. For our example, we clicked on **“CAPPS Reports (2),”** and below are the results that were displayed. Clicking on one of the results will automatically take the user to that page.



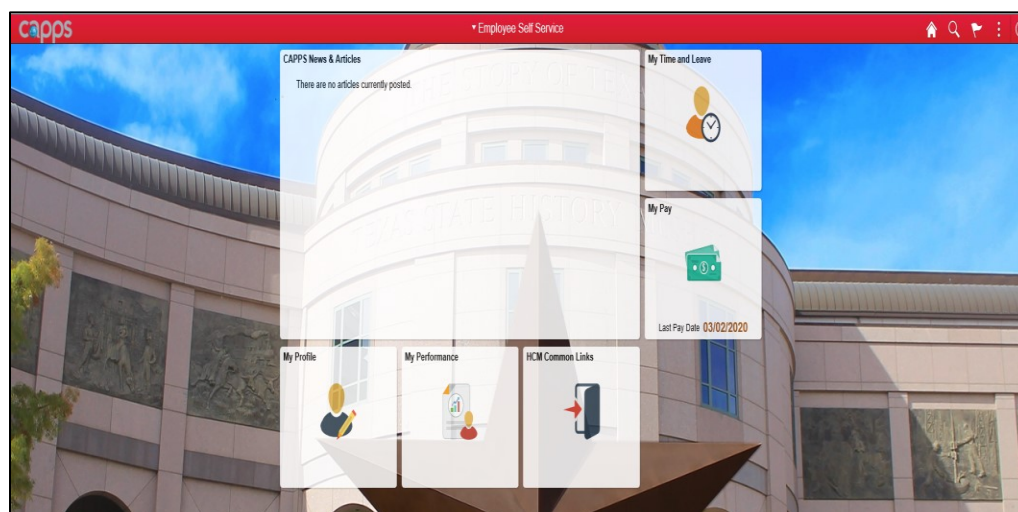
HOME BUTTON

The  Home button navigates the user to the **Employee Self-Service** landing page.



EMPLOYEE SELF-SERVICE NAVIGATION BAR

Using the internet browser, log in to CAPPs. After successful login, the system will default to the new CAPPs HR/Payroll landing page. For users with additional access and/or roles, those landing pages are explained in other sections of this document.



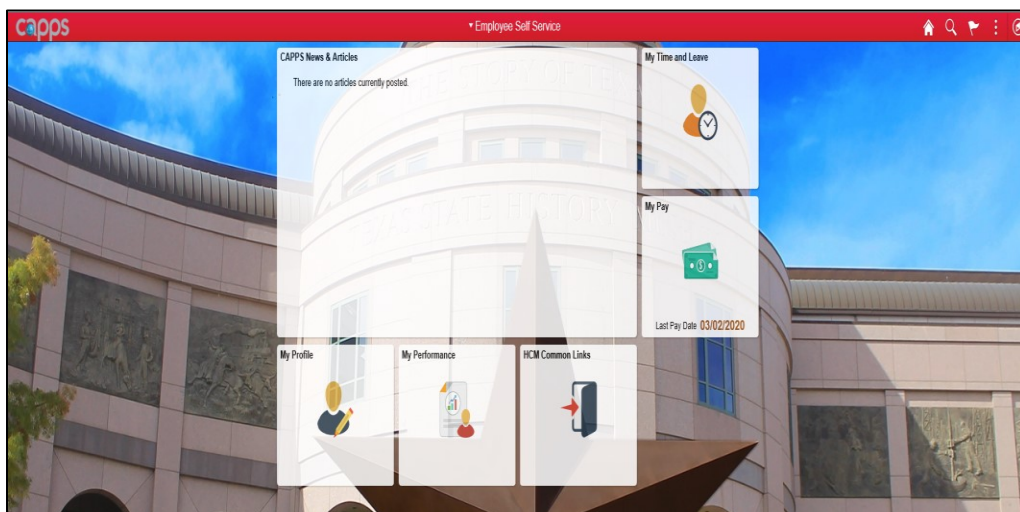
NAVIGATING ESS TILES

The Employee Self-Service tiles will allow employees to quickly access the most commonly used pages. The tiles are displayed according to TMD's current configuration of the HR/Payroll core

modules and the optional modules.

The tiles provide access into the appropriate module:

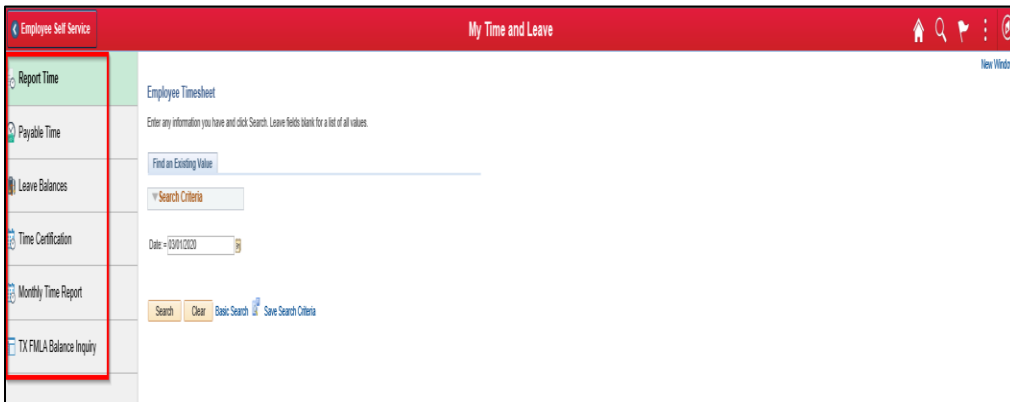
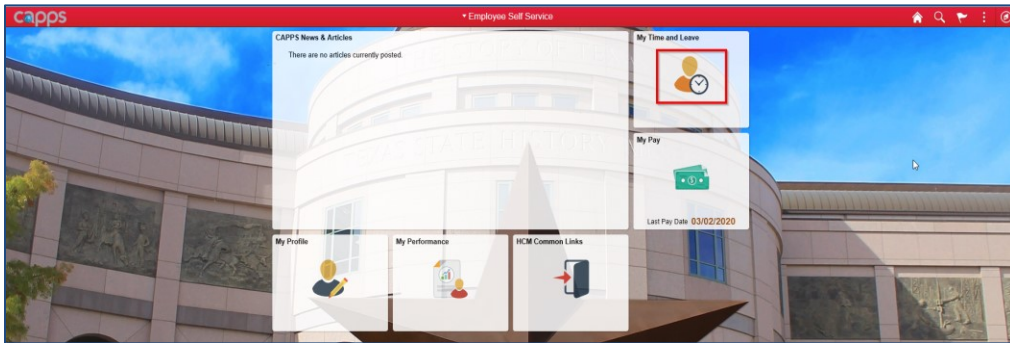
- **CAPPS News & Articles** - provides system updates and security related issues.
- **My Time & Leave** - defaults employees to their time sheet and associated Time and Labor features.
- **My Pay** - defaults employees to their paycheck and associated Payroll features.
- **My Profile** - defaults employees to their personnel file and associated HR features.
- **My Performance** (optional module) - defaults employees to their current performance management documents and associated Performance Management features.
- **HCM Common Links** - directs employees to the HR/Payroll common links page.



MY TIME AND LEAVE

The **My Time & Leave** tile navigates to:

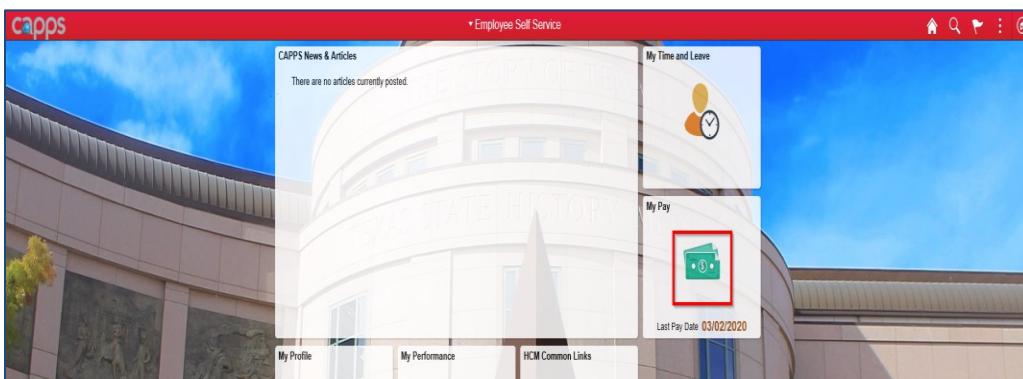
- **Report Time**
- **Payable Time**
- **Leave Balances**
- **Time Certification**
- **Monthly Time Report**
- **TX FMLA Balance Inquiry**

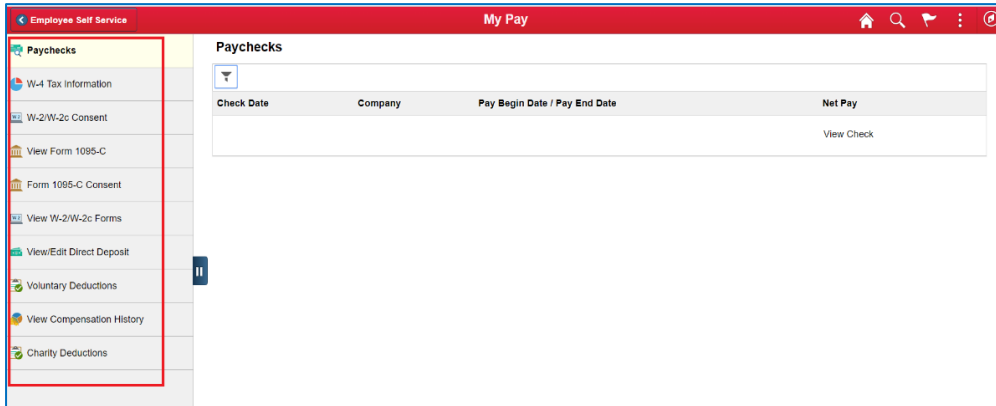


MY PAY

The **My Pay** tile navigates to:

- **Paychecks**
- **W-4 Tax Information**
- **W-2/W-2c Consent**
- **View Form 1095-C**
- **Form 1095-C Consent**
- **View W-2/W-2c Forms**
- **View/Edit Direct Deposit**
- **Voluntary Deductions**
- **View Compensation History**
- **Charity Deductions**

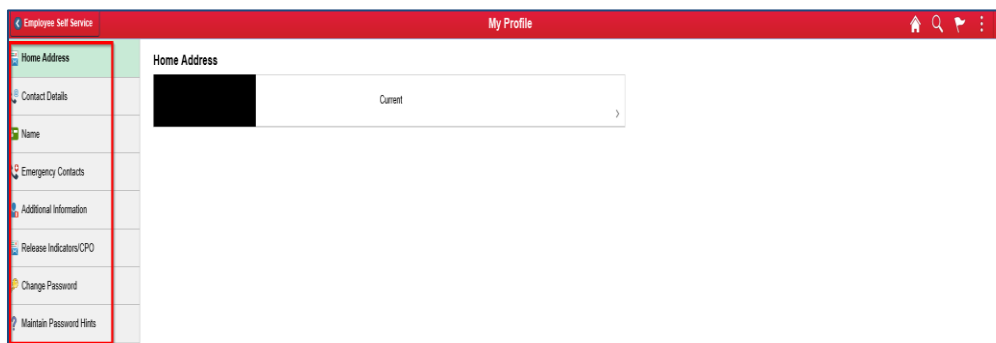




MY PROFILE

The **My Profile** tile navigates to and allows employees to view and make changes to the following:

- **Home Address**
- **Contact Details**
- **Name**
- **Emergency Contacts**
- **Additional Information**
- **Release Indicators/CPO**
- **Change Password**
- **Maintain Password Hints**

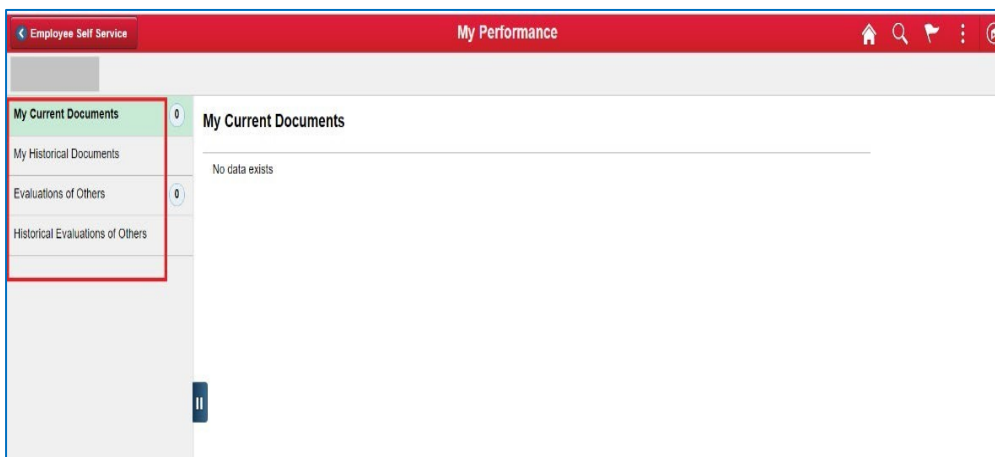
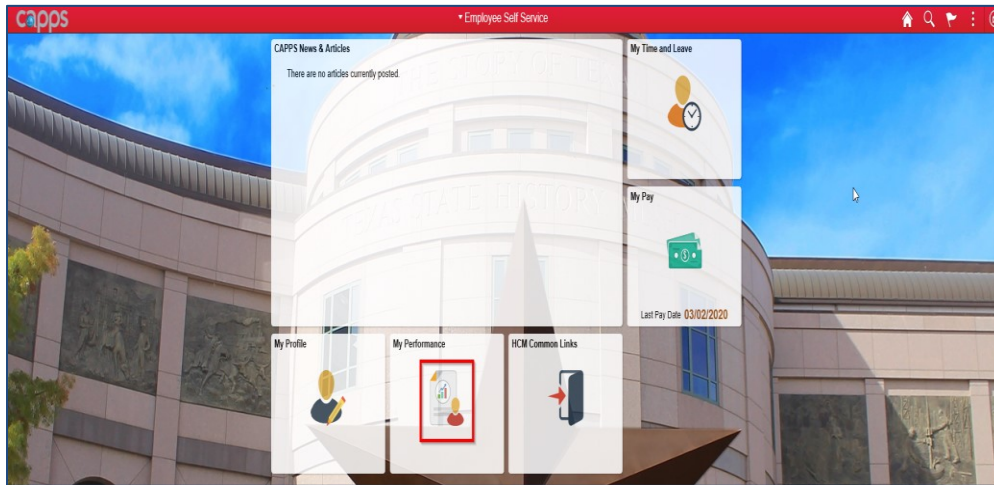


MY PERFORMANCE

The **My Performance Management** tile navigates to:

- **My Current Documents**
- **My Historical Documents**
- **Evaluations of Others**
- **Historical Evaluations of Others**

Note: This is an optional module.



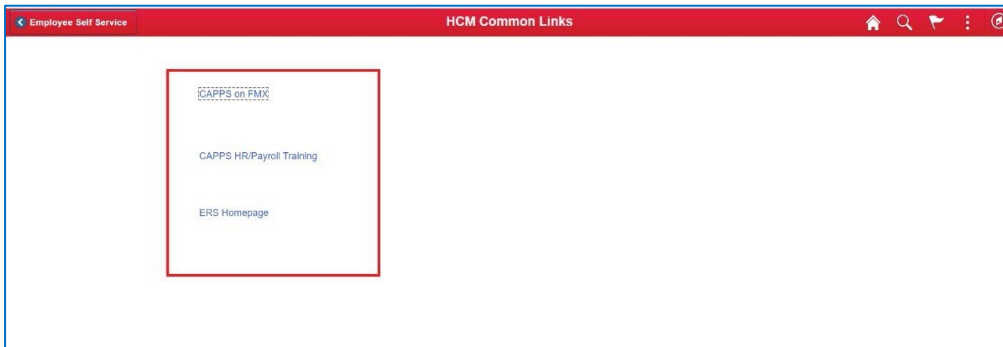
HCM COMMON LINKS

The former **Common Links** section was changed to the new **HCM Common Links** tile. This new tile includes links to:

- CAPPS on FMX
- CAPPS HR/Payroll Training
- ERS Homepage

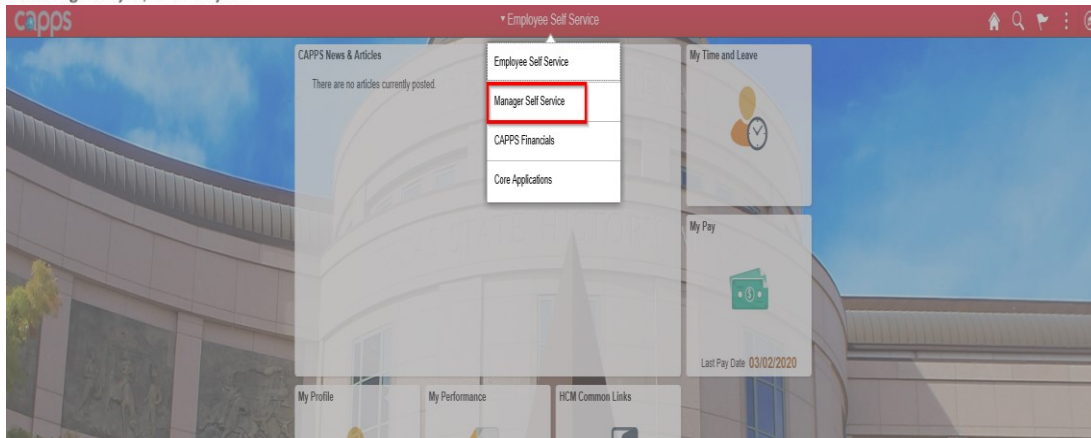
The following former **Common Links** were either removed or relocated:

- **Change Password** - moved to **My Profile** tile
- **Maintain password Hints** – moved to **My Profile** tile
- **Set Portal Accessibility Flag** - removed
- **Business Objects** - moved within the new **Core Applications** dropdown landing page

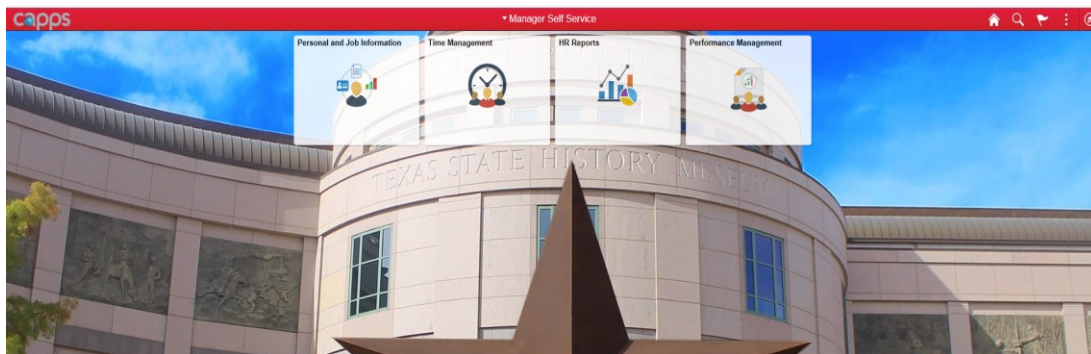


MANAGER SELF-SERVICE LANDING PAGE

Using the internet browser, log in to CAPPs. After a successful login, the system will default to the new **Employee Self-Service** landing page. Select the dashboard drop-down menu. Then select the **Manager Self-Service** option.



The Manager Self-Service landing page will be displayed.



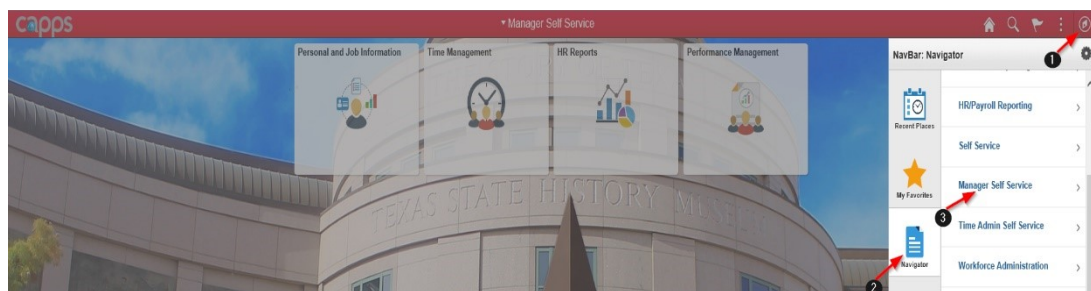
NAVIGATING MSS TILES

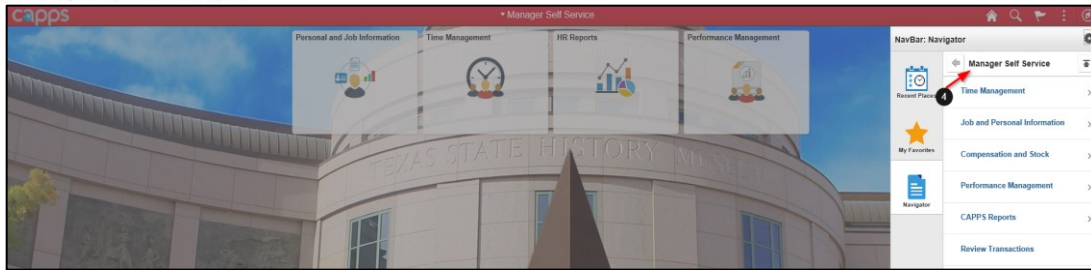
The **Manager Self-Service** tiles will allow managers to quickly access the most commonly used pages. The tiles are displayed according to TMD's current configuration of the HR/Payroll core modules and the optional modules.

The tiles provide access into the appropriate module:

- **Personal and job Information** - View/Edit employees personal and job information.
- **Time Management** - Access employees Time and Leave related features.
- **HR Reports** - Access to defaults reports.

You may also utilize CAPPS **Navigator** to view the Manager Self-Service folder and sub folders.





Note: Review pages 5 to 7 for additional information on CAPPs Navigator.

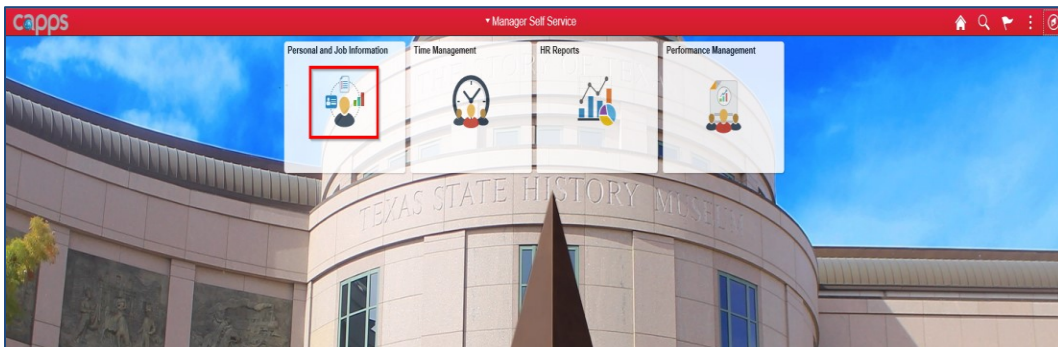
The following features or buttons were relocated:

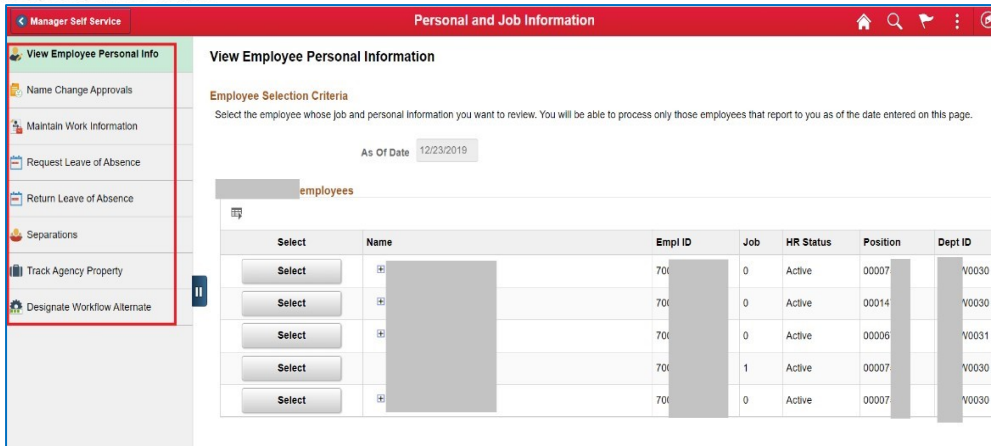
- Hire Candidate - moved to the **Recruit** tile
- Reporting - moved to the dropdown navigation **Core Applications & HR Reports** tile
- Time and Leave Management - moved to the **Time Management** tile

PERSONAL AND JOB INFORMATION

The **Personal and Job Information** tile navigates to:

- **View Employee Personal Info**
- **Name Changes Approvals**
- **Maintain Work Information**
- **Request Leave of Absence**
- **Return Leave of Absence**
- **Separations (includes retirements)**
- **Track Agency Property**
- **Designate Workflow Alternate**

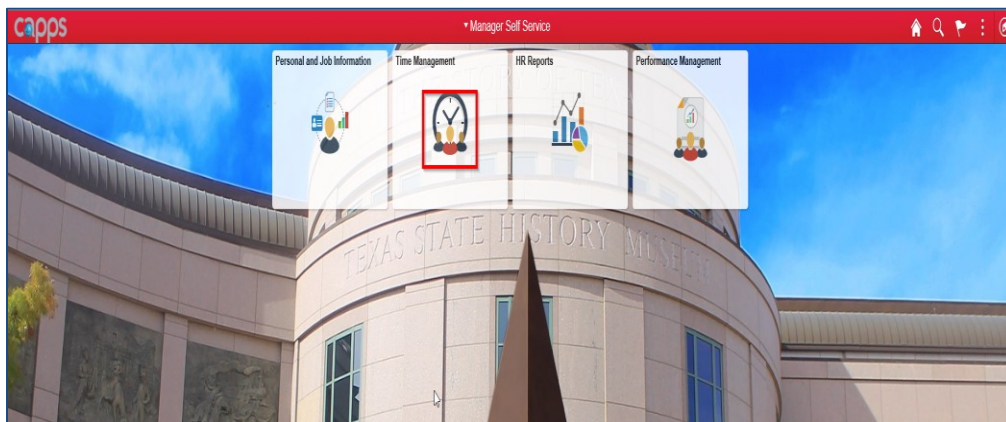




TIME MANAGEMENT

The new **Time Management** tile navigates to:

- **Manager Timesheets**
- **Time Certification**
- **Shift Pay**
- **Time and Leave Setup**
- **Manager Summary Approval**
- **Payable Time**
- **Leave Balances**
- **Schedule Override**
- **Manage Exception**
- **TX FMLA Balance Inquiry**



Manager Timesheet

Time Certification

Shift Pay

Time and Leave Setup

Manager Summary Approval

Payable Time

Leave Balances

Schedule Override

Manage Exceptions

TX FMLA Balance Inquiry

Team Time

Manager Timesheet

Select Employee

Transaction Effective Date: 12/01/2019

Direct Reports For

Name	Empl ID	Job Title	Department
[Redacted]	[Redacted]	HR Manager	HRO
[Redacted]	[Redacted]	Major HR	HRO
[Redacted]	[Redacted]	Director, VESS	HRO
[Redacted]	[Redacted]	Executive Assistant, HR	HRO
[Redacted]	[Redacted]	HR Manager	HRO

Note: A Manager is also able to view indirect employees:

Team Time

Manager Timesheet

Select Employee

Transaction Effective Date: 12/01/2019

Direct Reports For

Name	Empl ID	Job Title	Department	Indirect Reports
[Redacted]	[Redacted]	HR Manager	HRO	+
[Redacted]	[Redacted]	Major HR	HRO	+
[Redacted]	[Redacted]	Director, VESS	HRO	+
[Redacted]	[Redacted]	Executive Assistant, HR	HRO	+
[Redacted]	[Redacted]	HR Manager	HRO	+

Team Time

Manager Timesheet

Select Employee

Direct Reports For

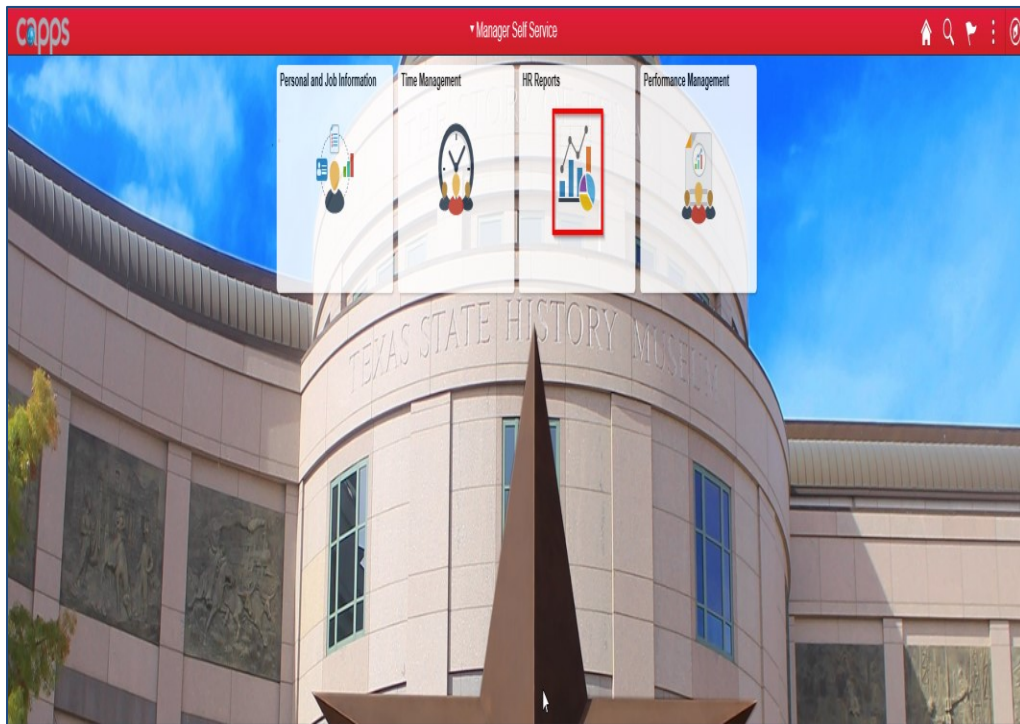
Name	Employee ID	Job Title	Department
[Redacted]	[Redacted]	Compensation	HRO
[Redacted]	[Redacted]	Compliance	HRO
[Redacted]	[Redacted]	Compliance	HRO
[Redacted]	[Redacted]	Compliance	HRO
[Redacted]	[Redacted]	HR Manager	HRO
[Redacted]	[Redacted]	Programs	HRO
[Redacted]	[Redacted]	Compensation	HRO
[Redacted]	[Redacted]	Compensation	HRO

HR REPORTS

The new **HR Reports** tile navigates to:

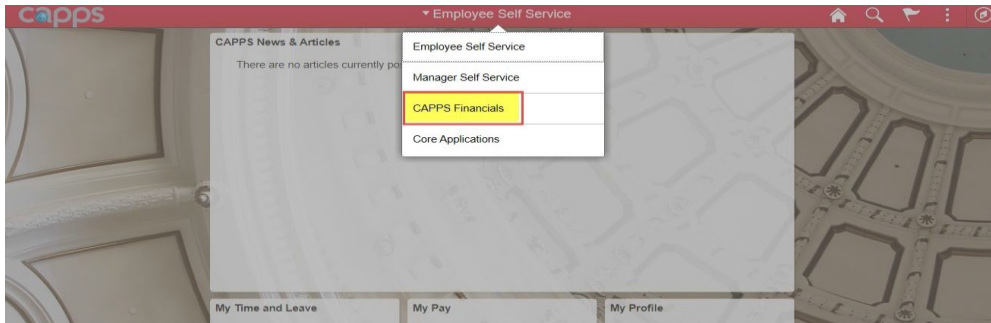
- **Run Reports**
- **View Reports**

Note: These features remained the same for managers.



FINANCIALS SELF-SERVICE NAVIGATION BAR

Using the internet browser, log into CAPPSS. Once logged in, the system will default to the new **Employee Self-Service** landing page. On the navigation bar, select the drop-down arrow. Select the **CAPPSS Financials** option.

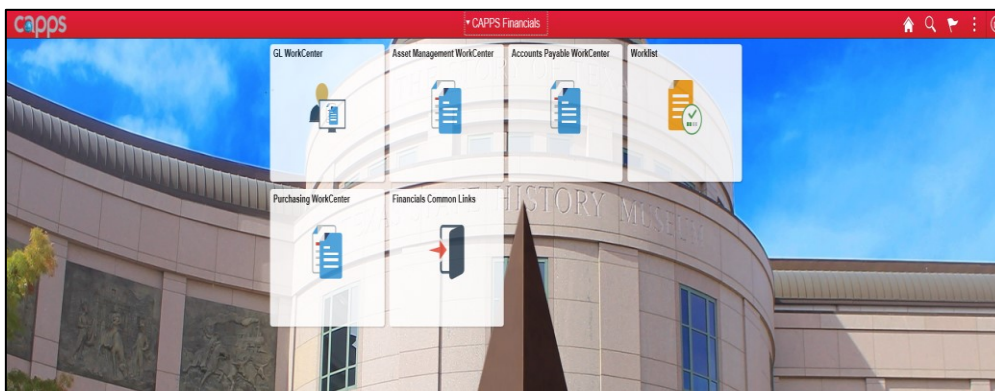


NAVIGATING FIN TILES

The **CAPPSS Financials** landing page will appear. The tiles shown below will allow the user to quickly access the most commonly used pages. The number of tiles displayed depends on a user's access.

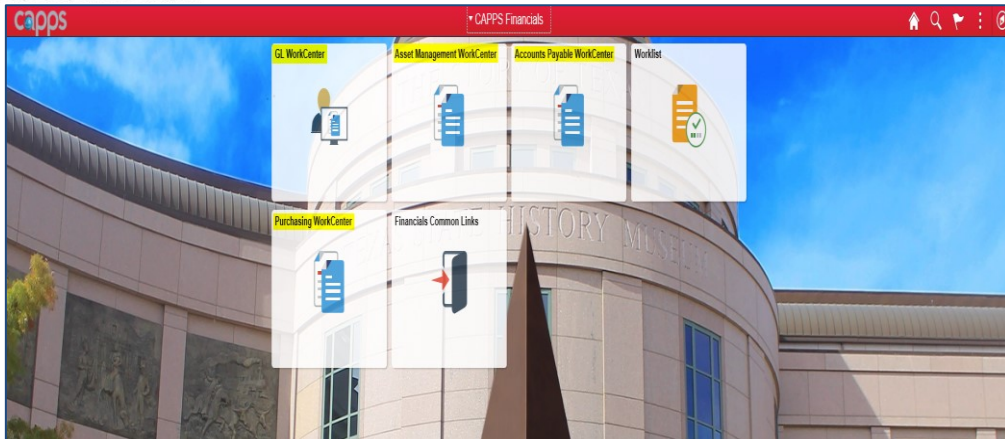
The tiles provide access into the Financials WorkCenter modules and Worklist links:

- **GL WorkCenter** - provides access to General Ledger related transactions and links.
- **Asset Management WorkCenter** - provides access to AM related transactions and links.
- **Accounts Payable WorkCenter** - provides access to AP related transactions and links.
- **Worklist** - defaults to the user's current worklist items page.
- **Purchasing WorkCenter** - provides access to PO related transactions and links.
- **Financial Common Links** - directs the user to the FIN common links page.



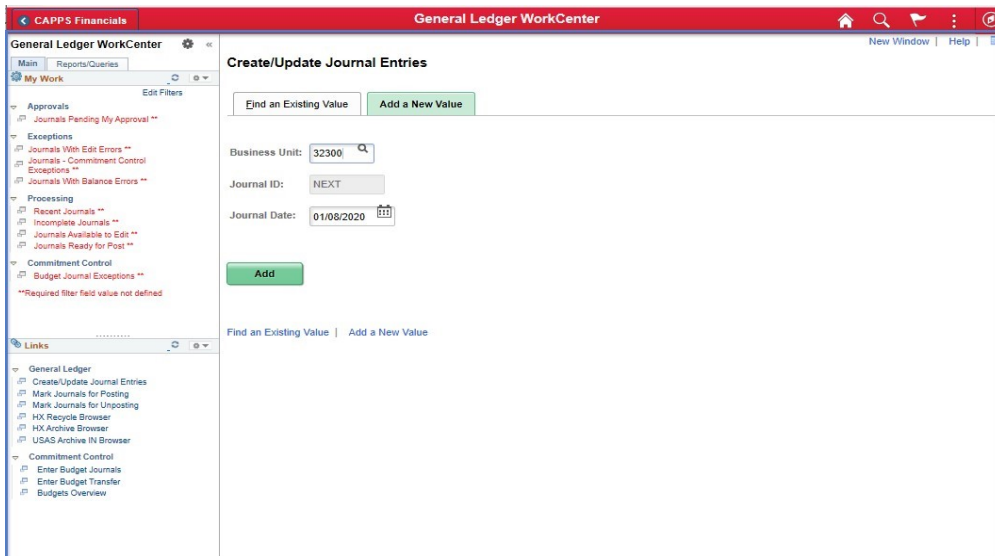
FIN WORKCENTERS

The **WorkCenter** tiles, highlighted below, allow quick access to the four main Financials modules:



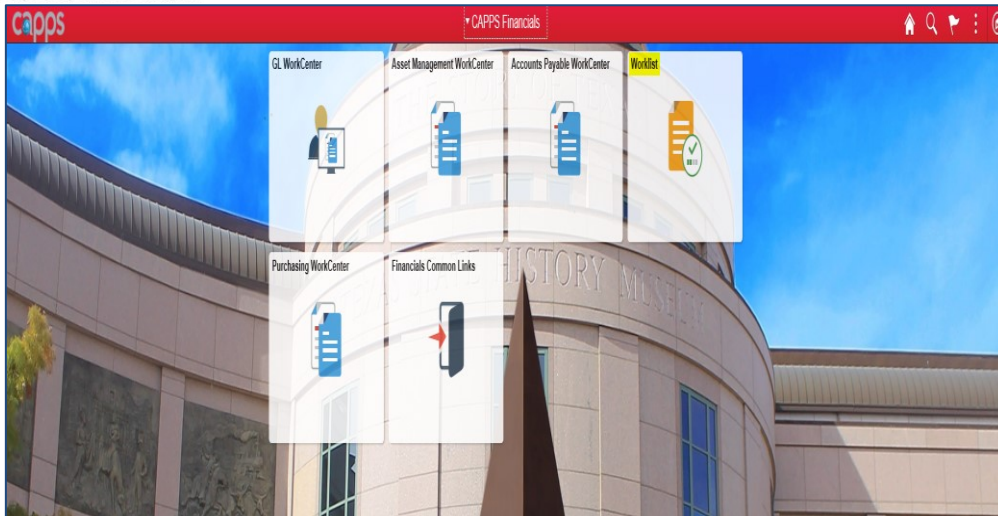

For an example, see the **General Ledger WorkCenter** page as shown below. This page allows quick access to the following GL and KK pages and links:

- **Create/Update Journal Entries** page
- **Approvals** link
- **Exceptions** page/links
- **Processing** page/links
- **Commitment Control** page/link
- **Common GL and KK Links**



FIN WORKLIST



The **Worklist** tile navigates to a user's worklist page. It allows user to view all work items waiting action required by employee:

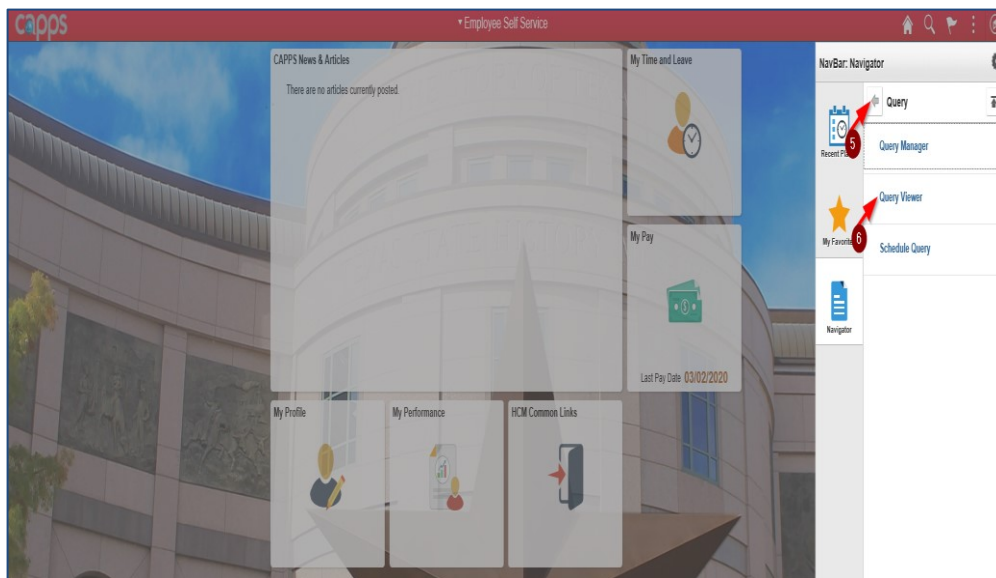
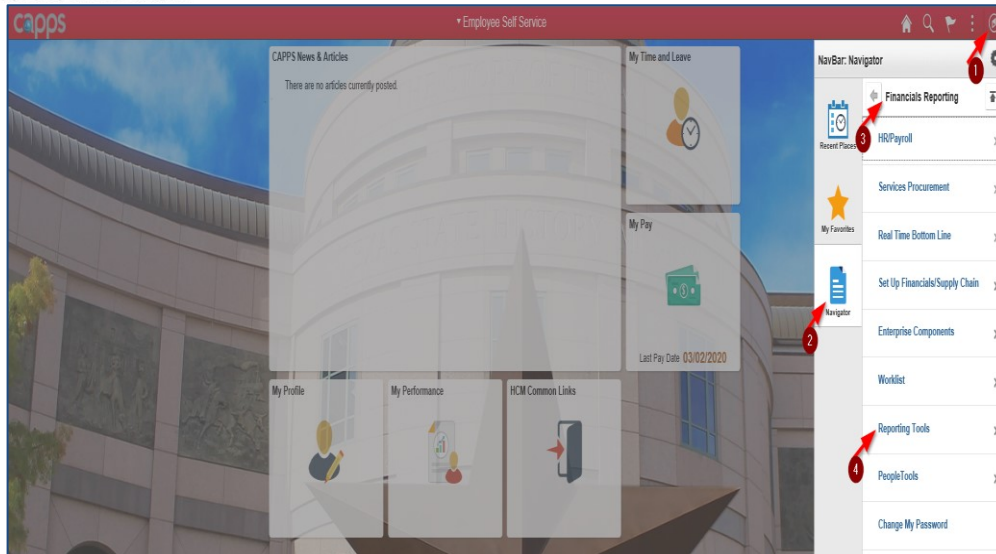



From	Date From	Work Item	Worked By Activity	Description	Total Amount	Priority	Link	Include Req
	03/16/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 545274 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015107 ORIGIN:PMAC	<input type="checkbox"/>
	03/16/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 545275 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015108 ORIGIN:PMAC	<input type="checkbox"/>
	03/16/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 545273 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015109 ORIGIN:PMAC	<input type="checkbox"/>
	03/10/2020	Transaction Approved	Approval Workflow			2-Medium	Description: 545258 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015100 ORIGIN:PMAC	<input type="checkbox"/>
	03/09/2020	Transaction Approved	Approval Workflow			2-Medium	Description: 545256 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015101 ORIGIN:PMAC	<input type="checkbox"/>
	03/04/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 545402 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0015146 ORIGIN:PMAC	<input type="checkbox"/>
	03/04/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 419726 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0018121 ORIGIN:COL	<input type="checkbox"/>
	03/04/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 545262 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0018271 ORIGIN:COL	<input type="checkbox"/>
	03/04/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 426843 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0018547 ORIGIN:COL	<input type="checkbox"/>
	03/04/2020	Approval Rounding	Approval Workflow			2-Medium	Description: 317776 49100 2017-01-05 N 0 Type: Extension BUSINESS UNIT 00100 REQ ID:REQ0014438 ORIGIN:TEM	<input type="checkbox"/>

FIN REPORTING

To access **Financials Reporting**, complete the following steps:

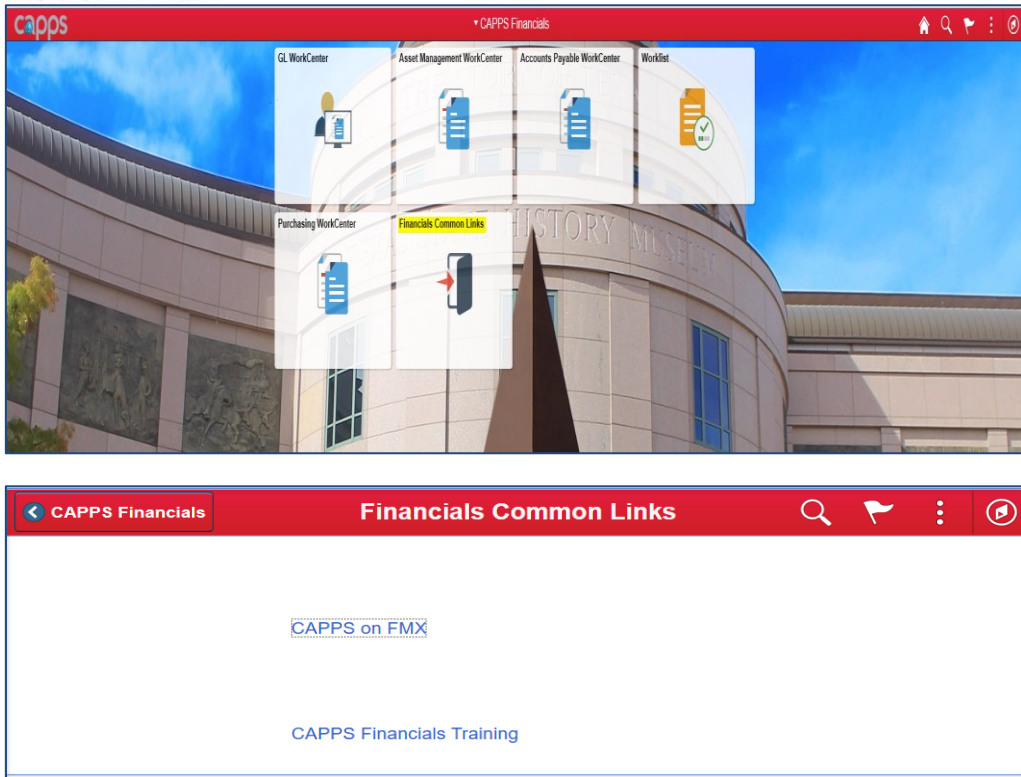
- Click on the **NavBar** symbol  at the top right corner of page (for more information on Navigation Bar, see Content 3 of this document)
- Click on Navigator  symbol
- Click on “Financials Reporting.” The display of this folder and its subfolders is dependent on user’s security access.
- To view query results, navigate to: **NavBar** Icon > Navigator > Financials Reporting > Reporting Tools > Query > Query Viewer



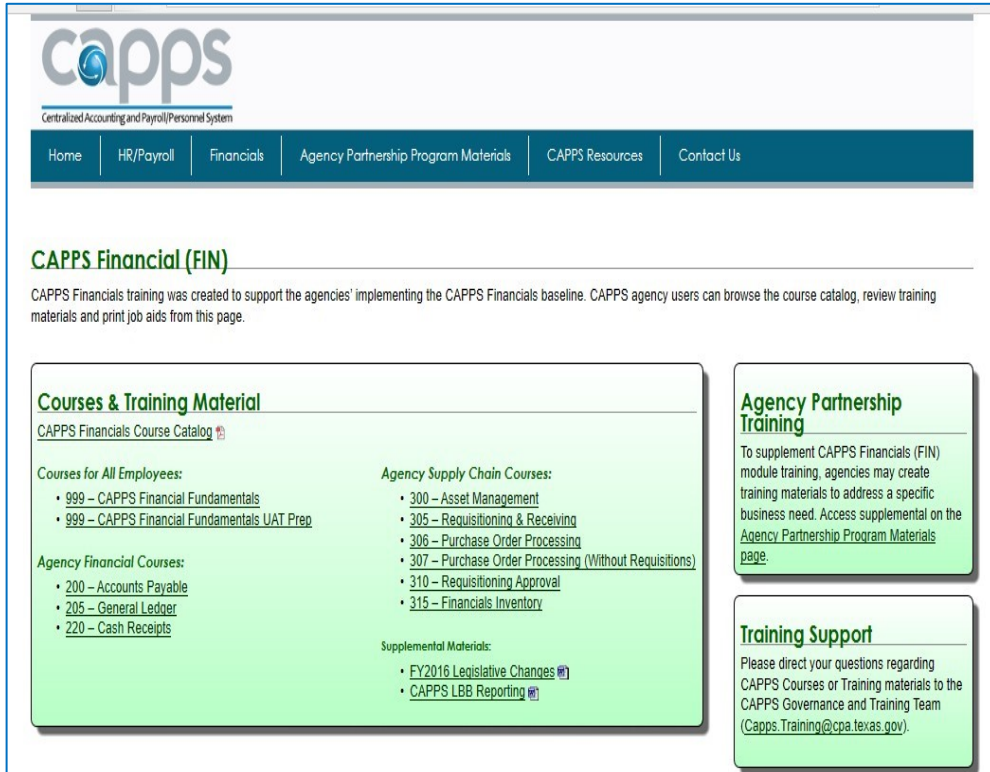
FIN COMMON LINKS

The **Financials Common Links** tile navigates to a common links page consisting of:

- CAPPS on FMX
- CAPPS Financials Training




Once users click on one of the available links, they will be taken to a New Window for that link. For example, to access **CAPPS Financials Training**, click on the CAPPS Financials Training link. The following new window page will appear:



CAPPS Financial (FIN)

CAPPS Financials training was created to support the agencies' implementing the CAPPS Financials baseline. CAPPS agency users can browse the course catalog, review training materials and print job aids from this page.

Courses & Training Material
 CAPPS Financials Course Catalog 

Courses for All Employees:

- 999 – CAPPS Financial Fundamentals
- 999 – CAPPS Financial Fundamentals UAT Prep



Agency Financial Courses:

- 200 – Accounts Payable
- 205 – General Ledger
- 220 – Cash Receipts

Agency Supply Chain Courses:

- 300 – Asset Management
- 305 – Requisitioning & Receiving
- 306 – Purchase Order Processing
- 307 – Purchase Order Processing (Without Requisitions)
- 310 – Requisitioning Approval
- 315 – Financials Inventory

Supplemental Materials:

- [FY2016 Legislative Changes](#) 
- [CAPPS LBB Reporting](#) 

Agency Partnership Training

To supplement CAPPS Financials (FIN) module training, agencies may create training materials to address a specific business need. Access supplemental on the [Agency Partnership Program Materials page](#).

Training Support

Please direct your questions regarding CAPPS Courses or Training materials to the CAPPS Governance and Training Team (Capps.Training@cpa.texas.gov).

To go back, click on “CAPPS Financials” at the top left corner of page.




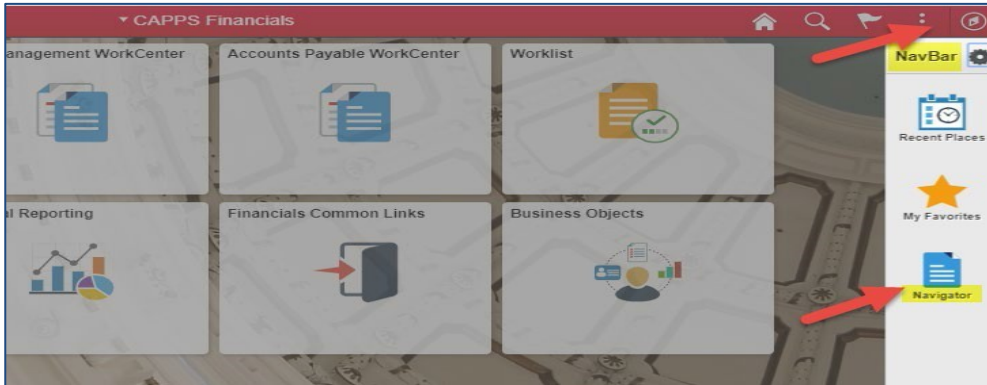
CAPPS Financials Financials Common Links

[CAPPS on FMX](#)

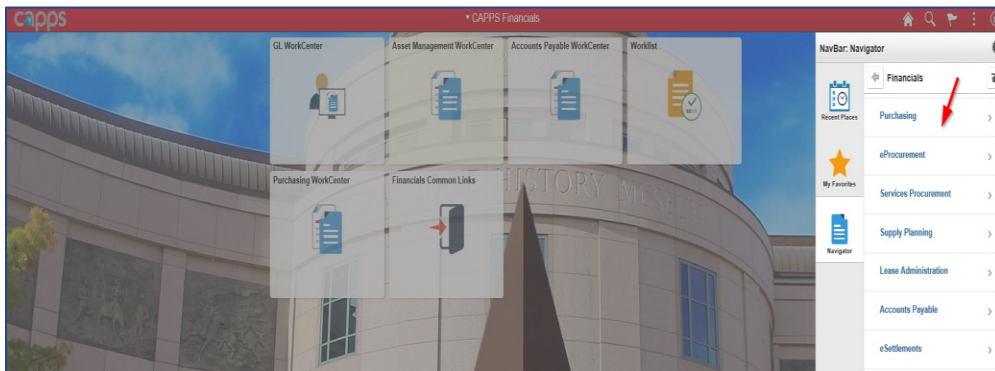
[CAPPS Financials Training](#)

NAVIGATION TO FIN MODULES

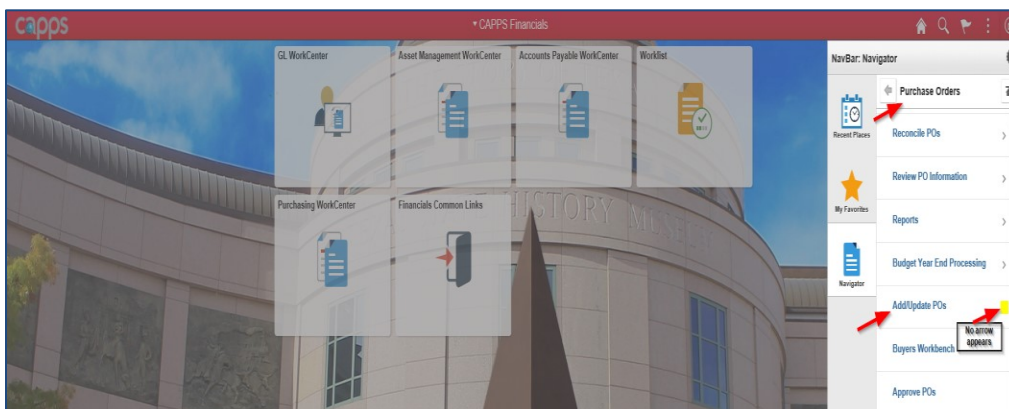
To bring up the new navigation options, click on the **NavBar**  symbol that can be found at the top right corner of the **CAPPS Financials** page. Click on the **“Navigator”** to view the FIN module options users have access to.




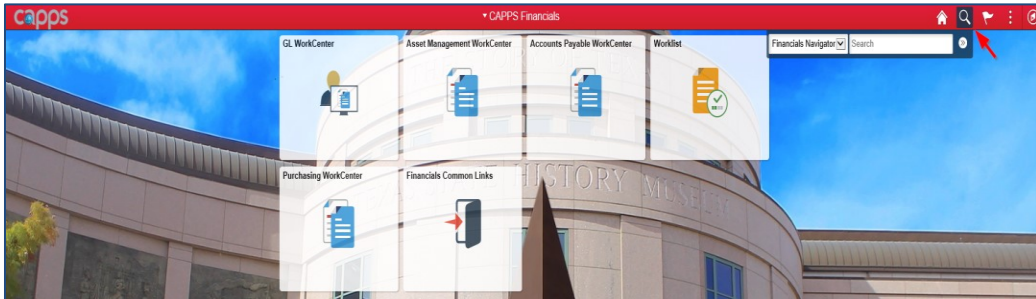
The following page will appear showing the various FIN modules the user has access to. When a user clicks on one of the FIN module options additional options will display. The user will continue navigating through the list of module options until the appropriate module page is displayed.



For example, to navigate to the **Add/Update POs** page, the user would click on **“Purchasing,”** then on **“Purchase Orders,”** and finally on **“Add/Update POs”** as shown below.

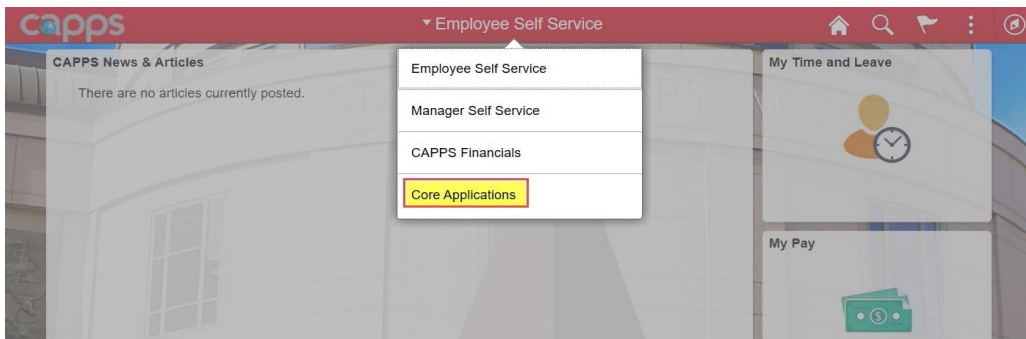


To bring up the new global search feature, click on the **Search**  symbol that can be found at the top right corner of the CAPPS Financials page. Enter the FIN module criteria in the Search box and click the “>>” icon. The Search Results will be listed. To proceed to any of the listed results, click on that result to be automatically taken to that FIN module page. See the **Global Search** section of this document for more information on searching in CAPPS.

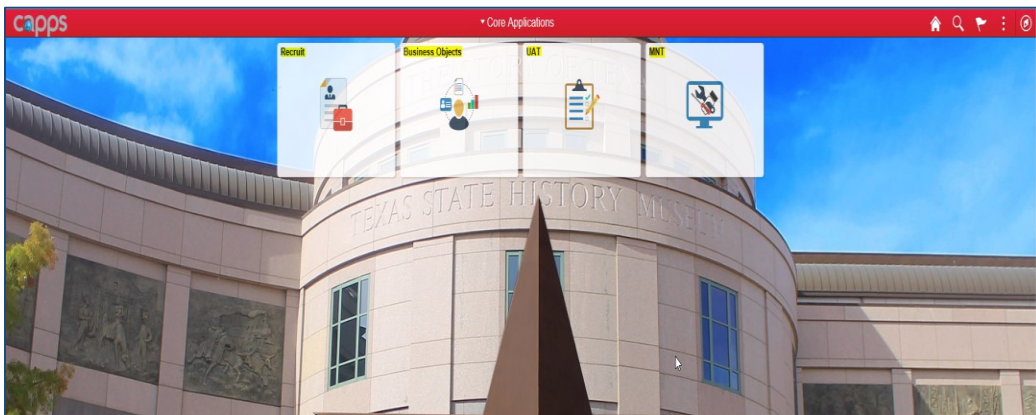


CORE APPLICATIONS

On the navigation bar, select the drop-down arrow. Select the **Core Applications** landing page option.



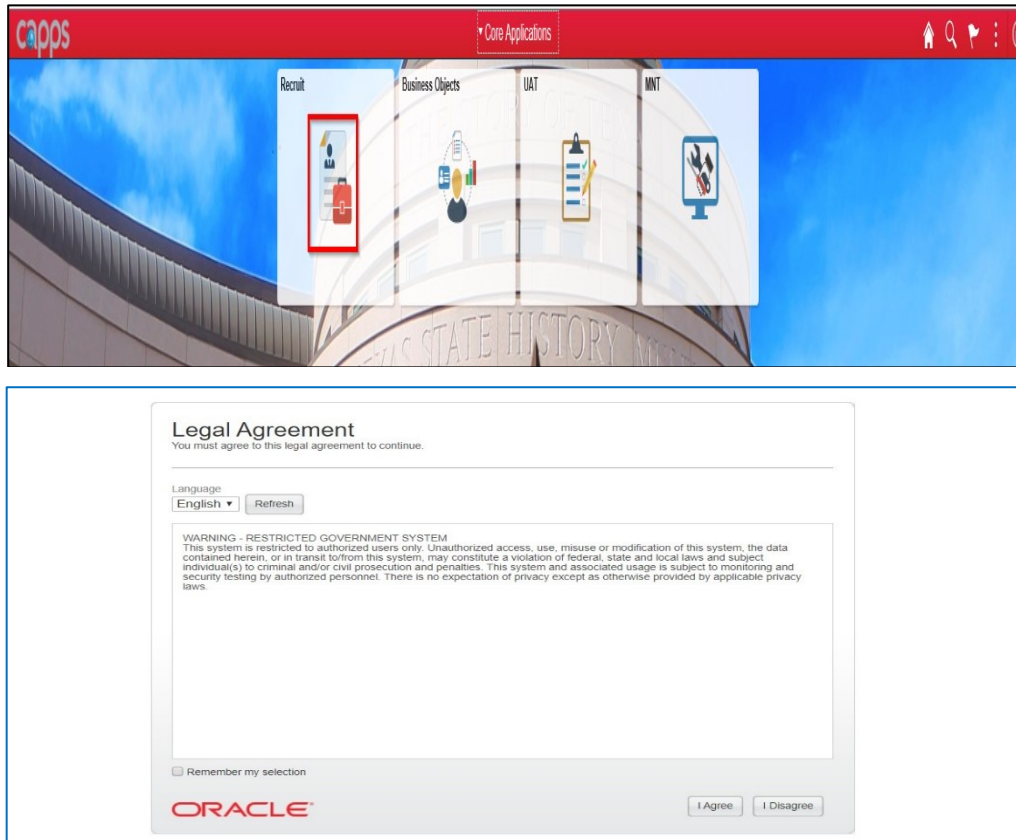
The **Core Applications** landing page will appear. The tiles shown below will allow user to quickly access **Recruit**, **Business Objects (BOBJ)**, and **test environments**. The number of tiles displayed depends on the user’s access. Upon clicking on the tile, the user will be taken to the appropriate related page.



RECRUIT

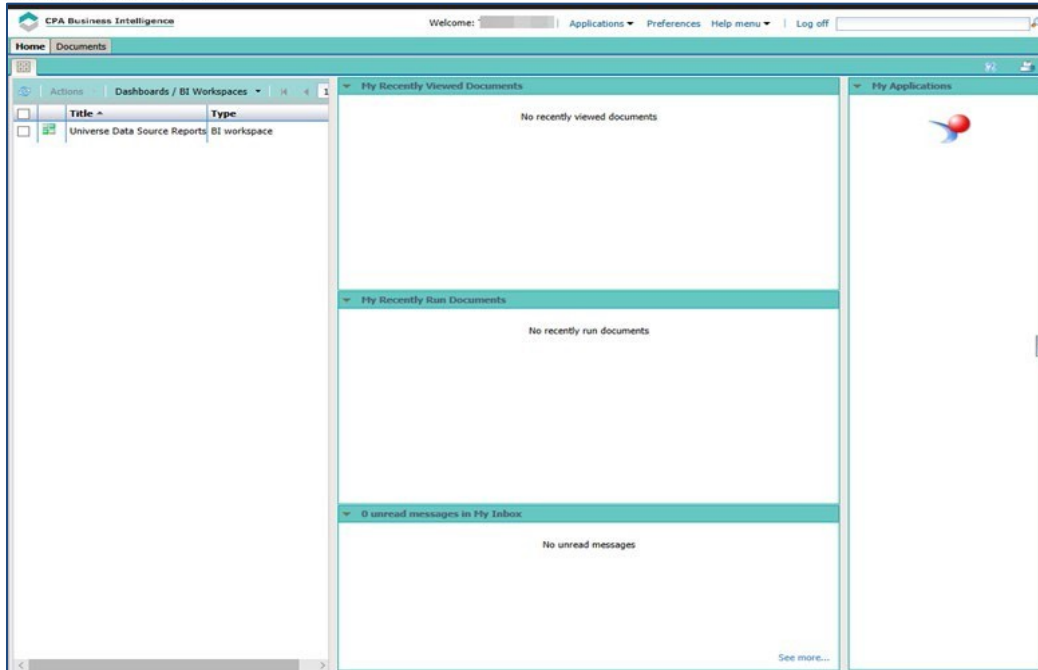
To access CAPPS **Recruit** features, click on the **Recruit** tile.

Note: There is no change to the features for managers.



BUSINESS OBJECTS

To navigate to **Business Objects** reporting, click on the **Business Objects** tile. The user will then be taken to a new window and the following page will be displayed. From this page, the user can proceed with BOBJ reporting as normal.



TEST ENVIRONMENTS

To navigate to User Acceptance Testing (UAT) or Maintenance (MNT), click on the respective tile. A new window will open to a log in page. After logging in to UAT or MNT, the landing page will display as shown below.

