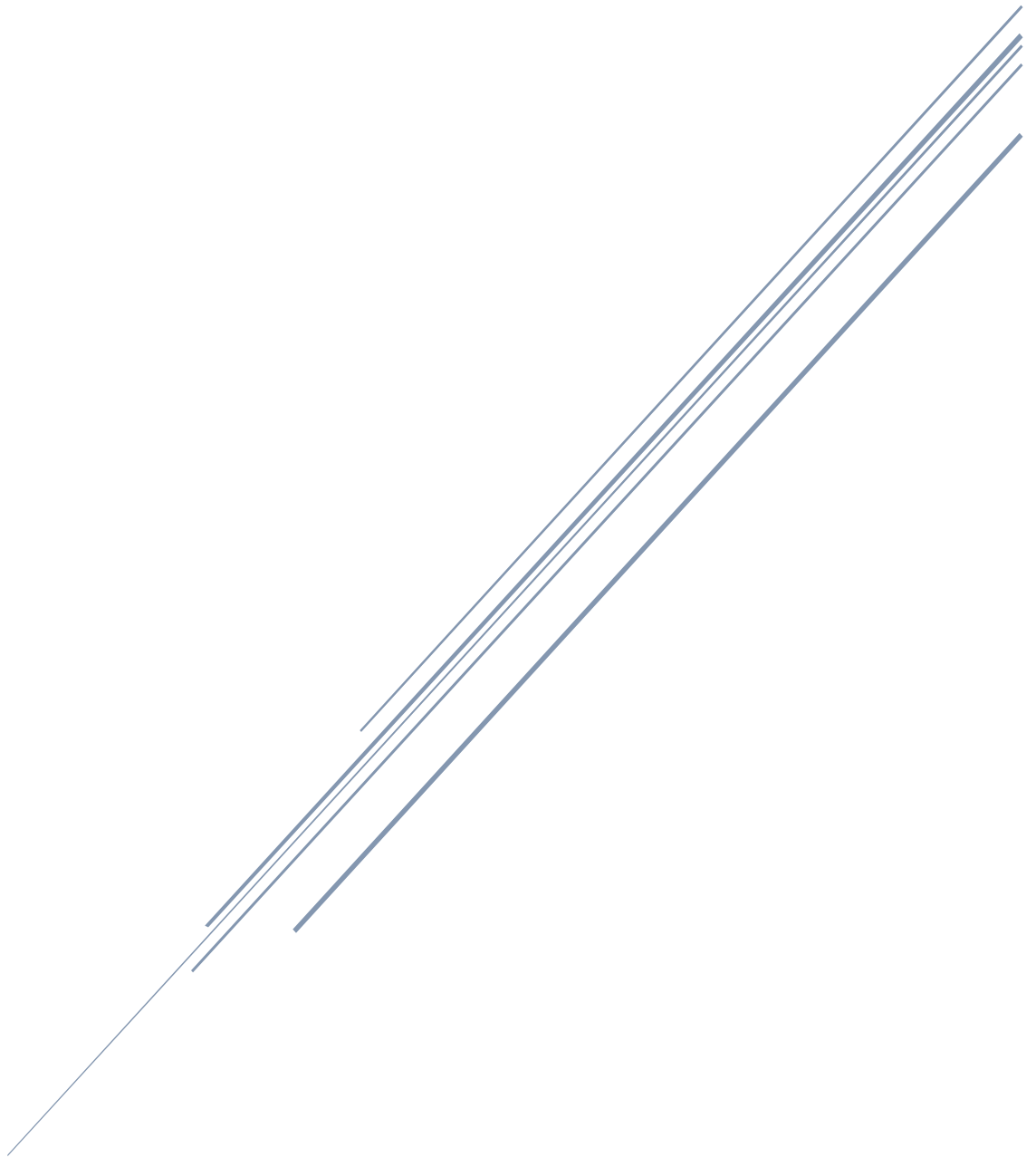


# CAPS System

v2.0 Network Manager Navigational Guide



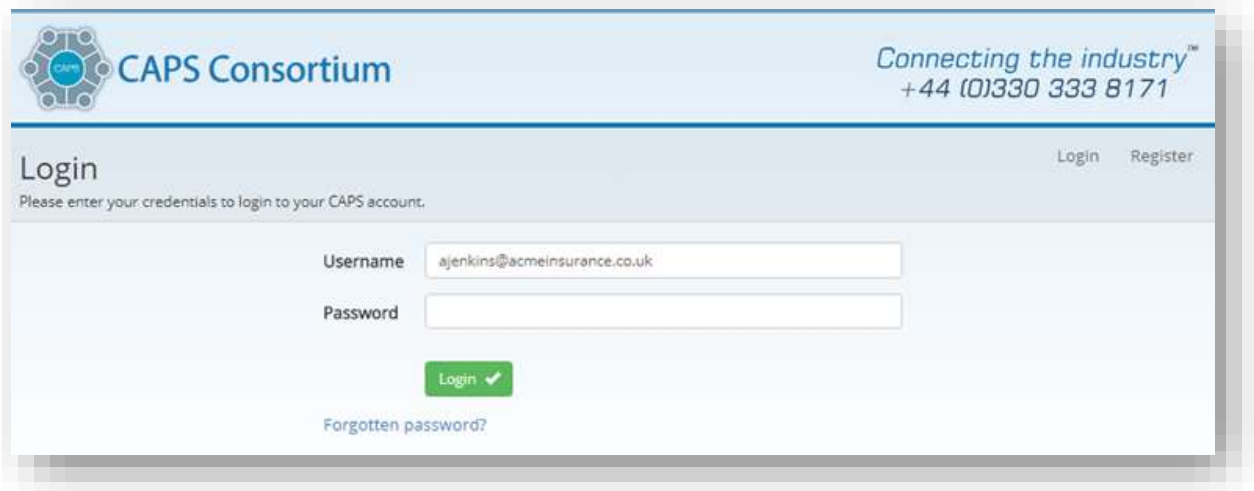
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## Accessing the System

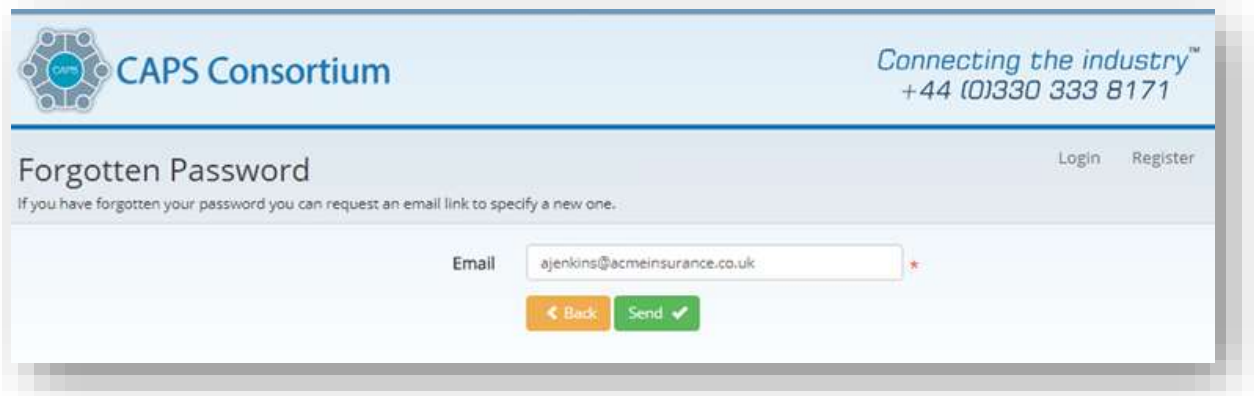
### Logging in

Login to the CAPS system [www.caps.co.uk](http://www.caps.co.uk) select “get Connected” from the Grey Column on the left of the home page and enter and enter your username and password. You also have the option to reset your password, to one of your own choice, using the “Forgotten password” option. This will need to be done on a quarterly basis, in line with the CAPS security governance and password change protocol.



The screenshot shows the CAPS Consortium login page. At the top left is the CAPS Consortium logo and name. At the top right is the tagline "Connecting the industry™" and the phone number "+44 (0)330 333 8171". Below the header, the word "Login" is displayed in a large font, with "Login" and "Register" links to its right. A sub-header reads "Please enter your credentials to login to your CAPS account." Below this are two input fields: "Username" with the value "ajenkins@acmeinsurance.co.uk" and "Password" which is empty. A green "Login" button with a checkmark is positioned below the password field. At the bottom of the form area, there is a link for "Forgotten password?".

### Forgot Password Support



The screenshot shows the CAPS Consortium "Forgotten Password" page. At the top left is the CAPS Consortium logo and name. At the top right is the tagline "Connecting the industry™" and the phone number "+44 (0)330 333 8171". Below the header, the words "Forgotten Password" are displayed in a large font, with "Login" and "Register" links to its right. A sub-header reads "If you have forgotten your password you can request an email link to specify a new one." Below this is an "Email" input field containing "ajenkins@acmeinsurance.co.uk" with a red asterisk to its right. Below the input field are two buttons: an orange "< Back" button and a green "Send" button with a checkmark.

Enter your e-mail address into the site & select “Send”.

Upon pressing “Send” the following message will be displayed;

**Note** – The e-mail link remains active for 30 minutes, if you “click” the link after this time you will be unable to reset your password and the message “Invalid Token” will be displayed. You can submit another password reset if you encounter this scenario.

### Password re-set communication

An automated email will be sent through to your address we hold on file (It’s important to keep this information updated) This will contain a link within that when clicked will direct you to the screen below.

Enter your chosen password, which will need to meet the minimum criteria. Once accepted select “Set”

**Note** – Passwords cannot be created and given over the telephone. These must be created by using the process above. If the system locks you out, you will need to contact the CAPS support team, to action a re-set.

## The Users Dashboard

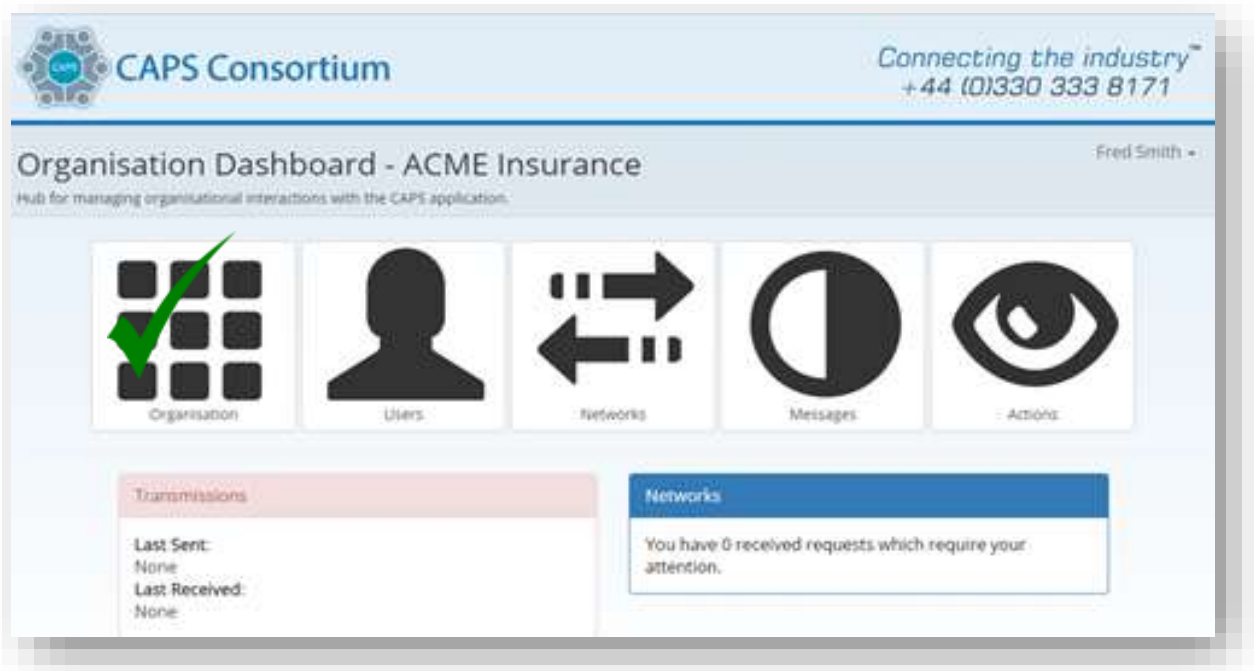
This page will be your main landing page upon successful access to the CAPS system. From here you can maintain your Organisation, add or remove people to/from your business as required.

The information on this page also allows you to view when your last transmission took place, to enable you to ensure your data is being exchanged. The dashboard has been configured to allow the users of the system control of how they set up their organisation, allocate users and access to the information, and select which services they wish to share data with.

Any Accepted network request will still require the Body Shops Management Supplier to configure their system to communicate and recognise your data share options.

### Organisation

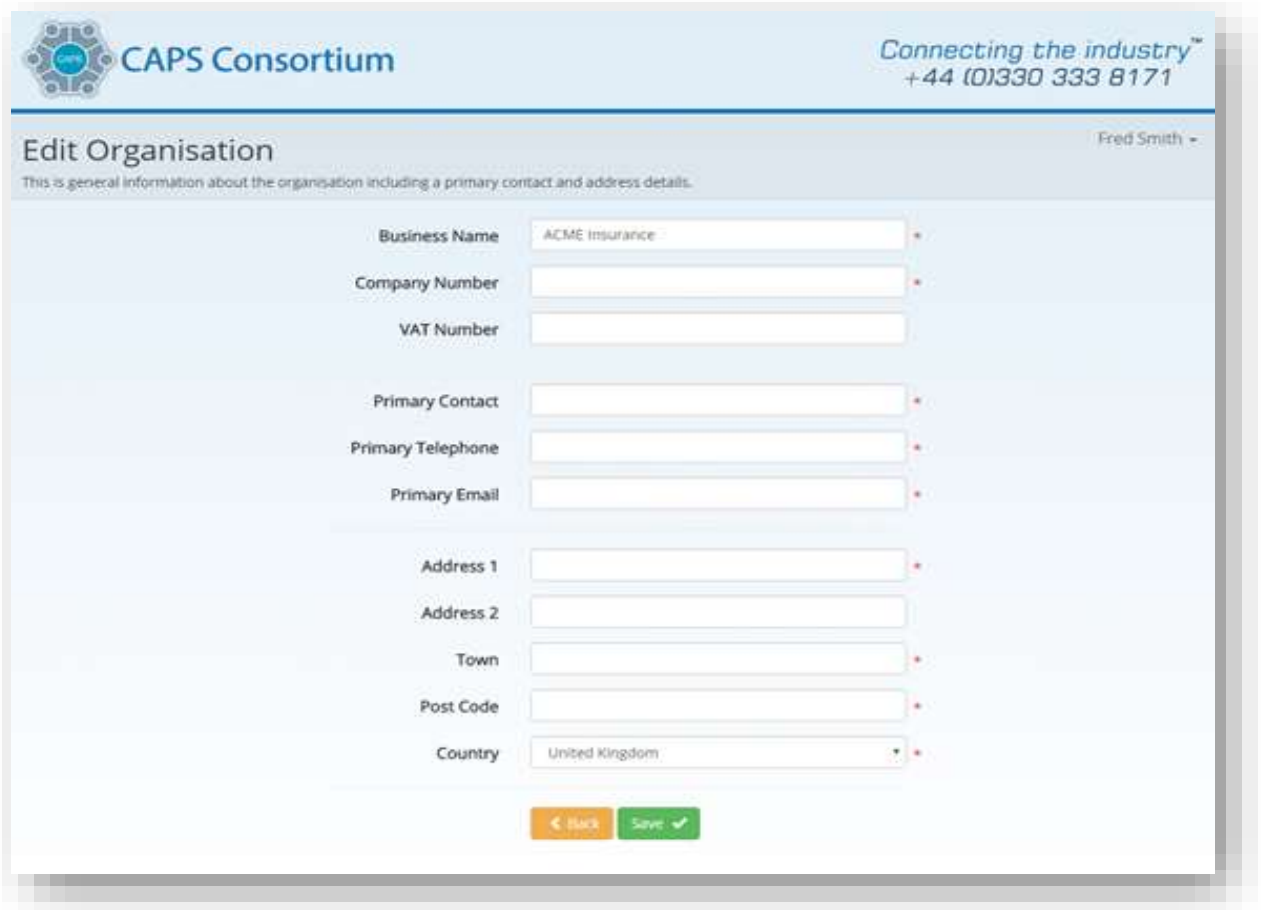
“Organisation” icon to edit any of the registered details of your organisation.



The screenshot shows the CAPS Consortium Organisation Dashboard for ACME Insurance. The header includes the CAPS Consortium logo and the tagline "Connecting the industry™" with the phone number "+44 (0)330 333 8171". The user name "Fred Smith" is displayed in the top right. The main heading is "Organisation Dashboard - ACME Insurance" with the subtitle "Hub for managing organisational interactions with the CAPS application." Below this, there are five icons representing different functions: Organisation (a 3x3 grid with a green checkmark), Users (a person silhouette), Networks (two arrows pointing in opposite directions), Messages (a circle with a vertical line), and Actions (an eye). At the bottom, there are two summary boxes: "Transmissions" showing "Last Sent: None" and "Last Received: None", and "Networks" showing "You have 0 received requests which require your attention."

## Edit your organisation

This section is to ensure that we have all the correct information to support and recognise your business category. Where the information is marked as (\*) these boxes are mandatory and require completion to allow validation of your information



**CAPS Consortium** *Connecting the industry™*  
+44 (0)330 333 8171

### Edit Organisation

Fred Smith -

This is general information about the organisation including a primary contact and address details.

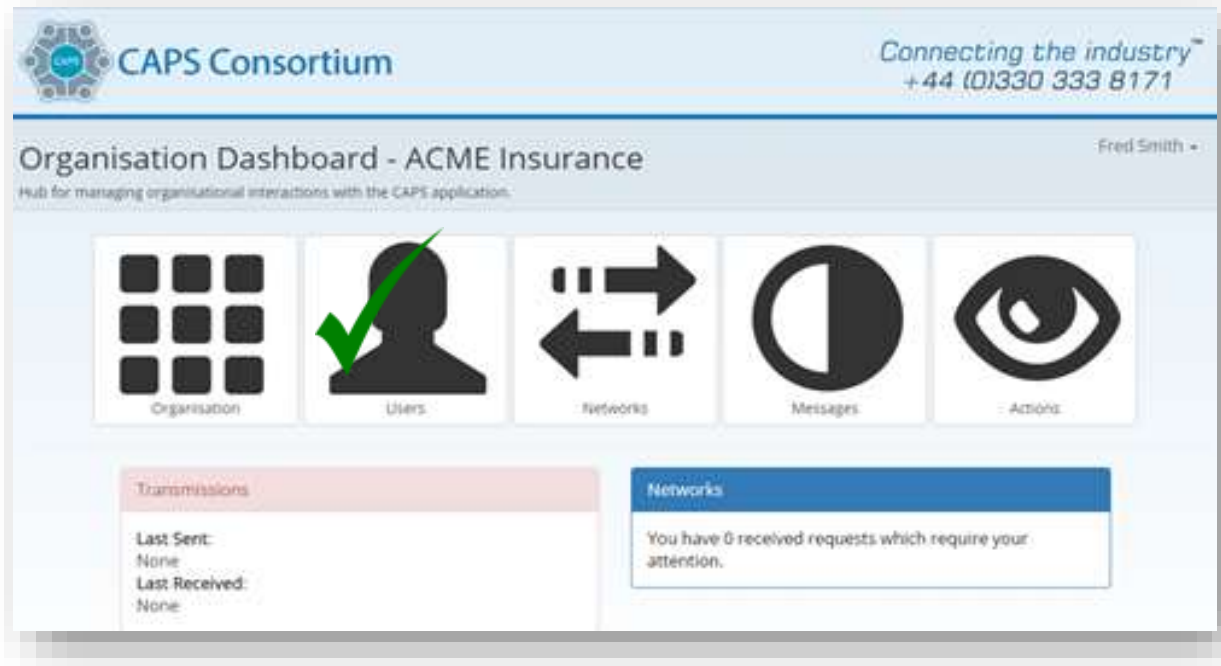
Business Name	<input type="text" value="ACME Insurance"/>	*
Company Number	<input type="text"/>	*
VAT Number	<input type="text"/>	*
Primary Contact	<input type="text"/>	*
Primary Telephone	<input type="text"/>	*
Primary Email	<input type="text"/>	*
Address 1	<input type="text"/>	*
Address 2	<input type="text"/>	*
Town	<input type="text"/>	*
Post Code	<input type="text"/>	*
Country	<input type="text" value="United Kingdom"/>	*

Once completed click "Save" and press back to return to your dashboard.

## Setting Users

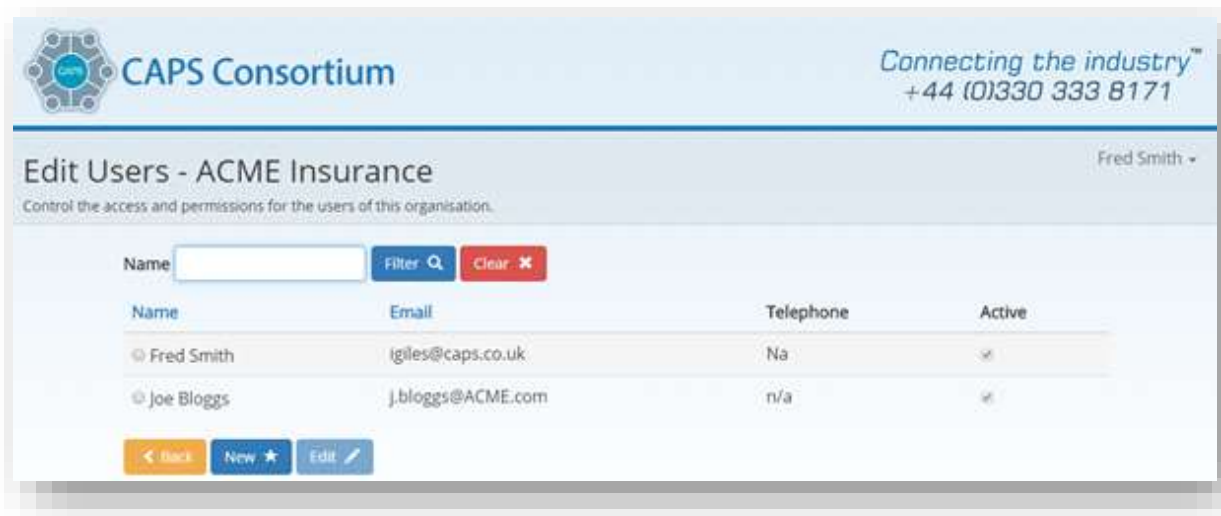
In addition to the primary contact details requested at the time of registration on the “Edit Organisation” screen. This section below allows you to add additional users to your organisation whilst also giving them roles and access rights to what they can actively manage within your organisation.

### Create additional Users



Here you can add additional users to your organisation, as well as assign them roles within your business.

To add a user, Select New ☆



Complete the required fields, select save and move on to assigning the role



**EDIT** CAPS Consortium *Connecting the industry™*  
+44 (0)330 333 8171

**Edit User - Fred Smith** User Name  
Control the access and permissions for this user.

First Name

Last Name

Email

Telephone

Active

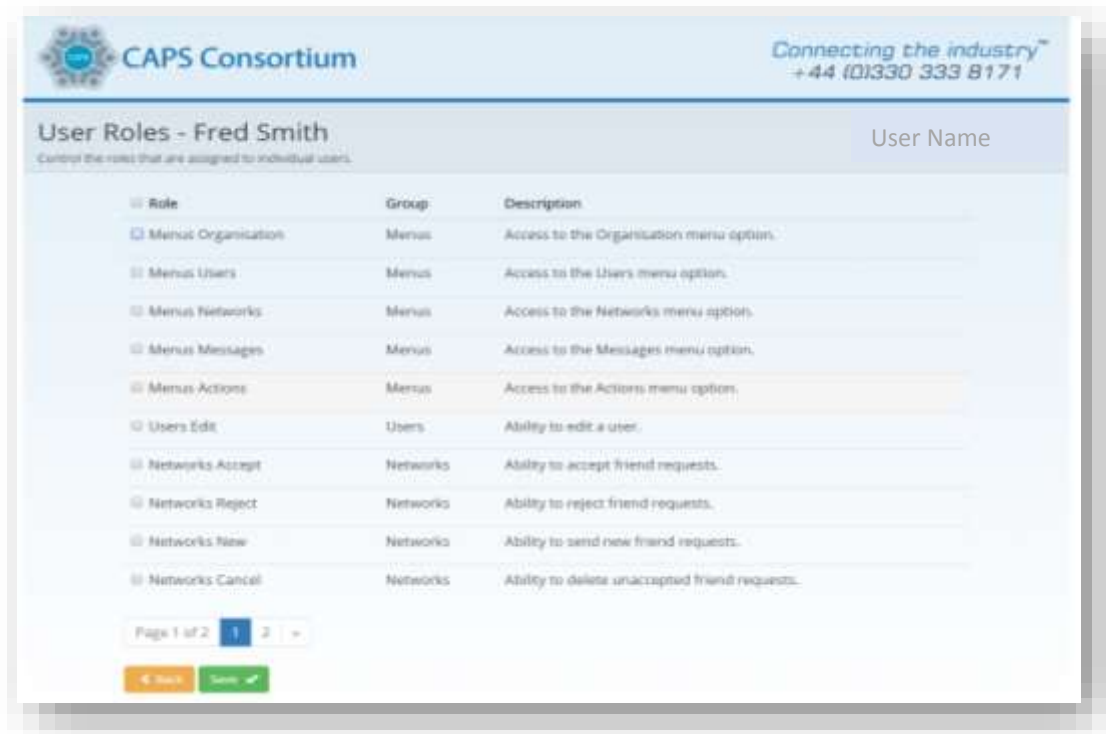
[Back](#) [Roles](#) [Password](#) [Move](#) [Save](#)

A new user has been successfully created

### Assign Roles

In this section once you have added the users within your organisation, you can also assign them roles within the business, activate passwords and more.

Complete the required fields, select save and move on to assigning the roles



**EDIT** CAPS Consortium *Connecting the industry™*  
+44 (0)330 333 8171

**User Roles - Fred Smith** User Name  
Control the roles that are assigned to individual users.

Role	Group	Description
<input type="checkbox"/> Menu Organisation	Menus	Access to the Organisation menu option.
<input type="checkbox"/> Menu Users	Menus	Access to the Users menu option.
<input type="checkbox"/> Menu Networks	Menus	Access to the Networks menu option.
<input type="checkbox"/> Menu Messages	Menus	Access to the Messages menu option.
<input type="checkbox"/> Menu Actions	Menus	Access to the Actions menu option.
<input type="checkbox"/> Users Edit	Users	Ability to edit a user.
<input type="checkbox"/> Networks Accept	Networks	Ability to accept friend requests.
<input type="checkbox"/> Networks Reject	Networks	Ability to reject friend requests.
<input type="checkbox"/> Networks New	Networks	Ability to send new friend requests.
<input type="checkbox"/> Networks Cancel	Networks	Ability to delete unaccepted friend requests.

Page 1 of 2 [1](#) [2](#)

[Back](#) [Save](#)

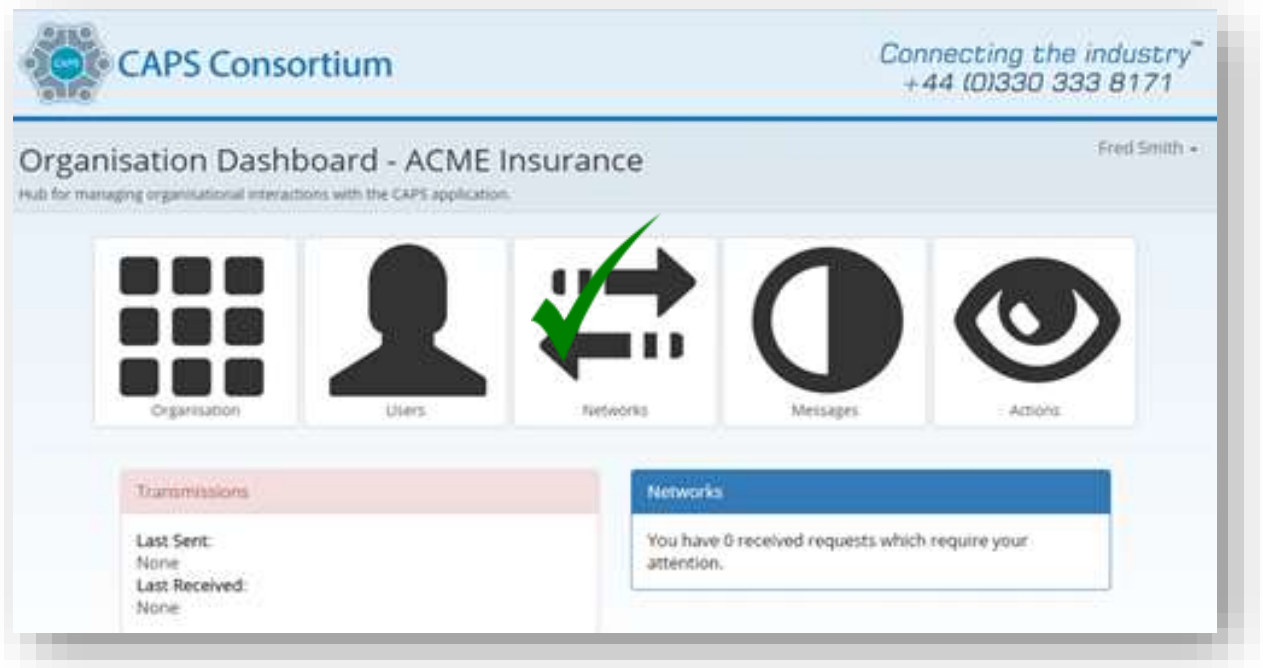
Upon completion, you must click “save” to confirm your additions and then click back returning to the main dashboard menu



## Networks

By selecting services from the list presented, you are affectingly creating your data share network. Each service has a brief description of how and what system is used in the data exchange chain. CAPS effectively exchange your data with the services you select by exchanging the data between you and the Bodyshop via your selected route.

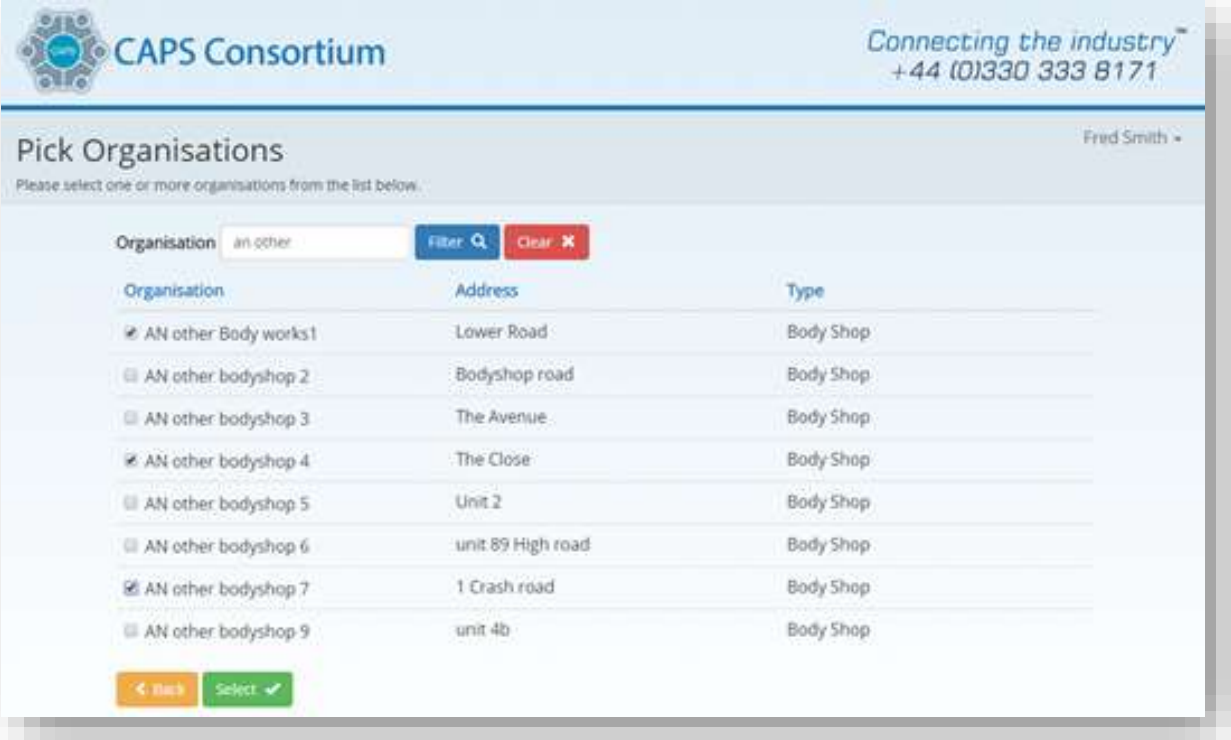
### Create your network



Upon access to this section you will be presented with a list of CAPS connected Body shops. You should tick the sites which are approved for you. Your selected sites will receive an automated email asking them to validate the ©CAPS Friendship Request, to share data via the CAPS system.

This is where you can add or remove data share partners. Whilst the set up and connectivity to share data relies on the Bodyshop system supplier, to ensure that your system is correctly connected. The ©CAPS Friendship Request protocol is made upon either the confirmation by your data share partner or the action of unticking a service box. By unselecting a service, this immediately stops any data share, immaterial as to whether the system supplier has made the configuration changes.

## Selecting Services



**Pick Organisations** Fred Smith ▾

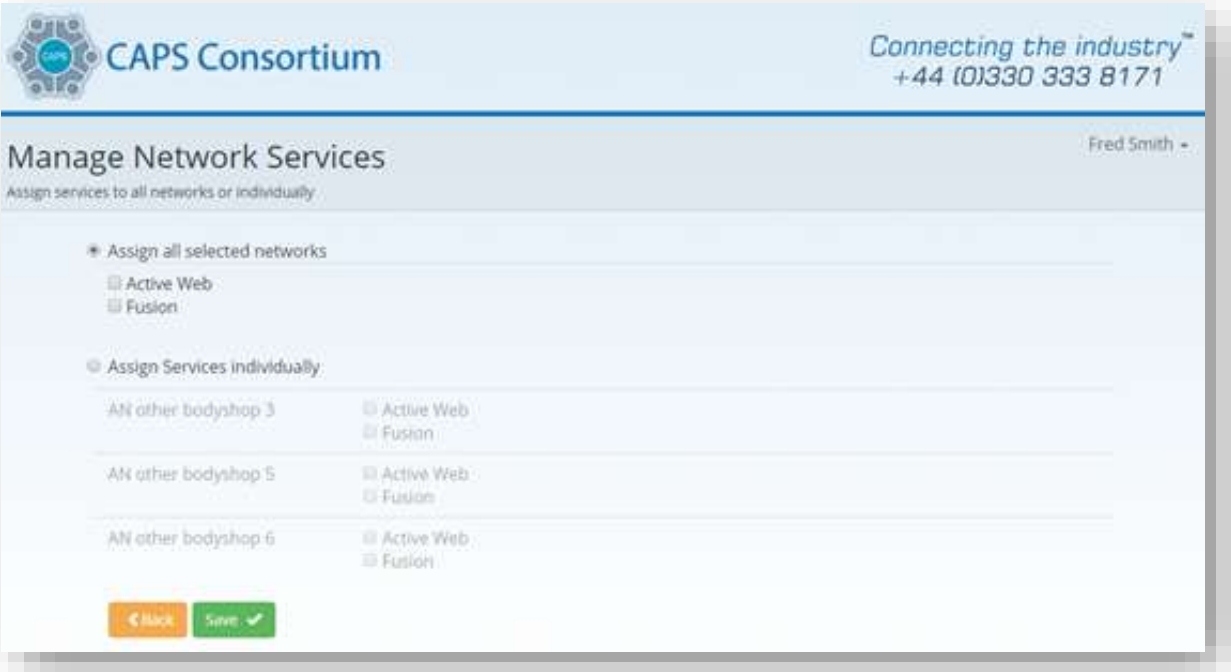
Please select one or more organisations from the list below.

Organisation:  Filter Clear

Organisation	Address	Type
<input checked="" type="checkbox"/> AN other Body works1	Lower Road	Body Shop
<input type="checkbox"/> AN other bodyshop 2	Bodyshop road	Body Shop
<input type="checkbox"/> AN other bodyshop 3	The Avenue	Body Shop
<input checked="" type="checkbox"/> AN other bodyshop 4	The Close	Body Shop
<input type="checkbox"/> AN other bodyshop 5	Unit 2	Body Shop
<input type="checkbox"/> AN other bodyshop 6	unit 89 High road	Body Shop
<input checked="" type="checkbox"/> AN other bodyshop 7	1 Crash road	Body Shop
<input type="checkbox"/> AN other bodyshop 9	unit 4b	Body Shop

Back Select

Then Assign the application service that you want to use, to send and receive by. You can assign one service to all, or apply individually if you have different service options.



**Manage Network Services** Fred Smith ▾

Assign services to all networks or individually

Assign all selected networks

- Active Web
- Fusion

Assign Services individually

AN other bodyshop 3	<input type="checkbox"/> Active Web <input type="checkbox"/> Fusion
AN other bodyshop 5	<input type="checkbox"/> Active Web <input type="checkbox"/> Fusion
AN other bodyshop 6	<input type="checkbox"/> Active Web <input type="checkbox"/> Fusion

Back Save

## Selecting Services cont.

Once a Bodyshop has been selected the recipient receives an email asking them to go into their viewable dashboard and either confirm or delete the ©CAPS Friendship Request. If confirmed the system automatically creates an electronic protocol “Handshake”.

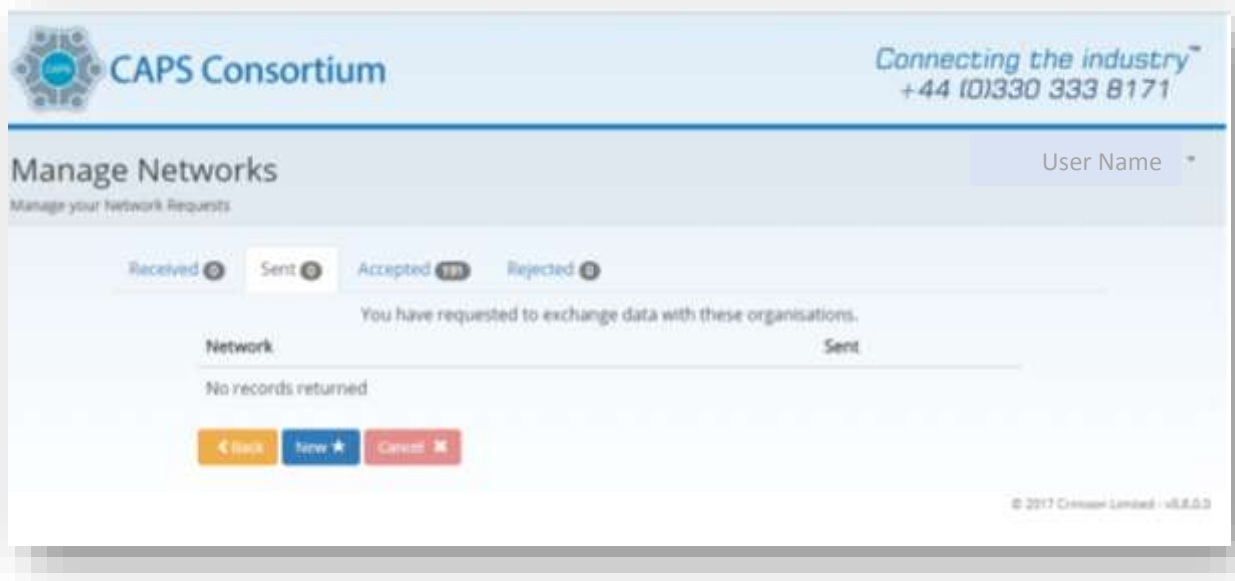
At this point the system management company also receives an automated email instructing them that the request has been confirmed, where they should ensure the body shops system is set up to share data with the agreed party/s.

**Note** – Any delays in setting up your connection and data flowing may be down to the Management system provider and the work load/priority they have within their own business.

Your dashboard will also provide status updates on the number of service requests sent, accepted and or rejected.

## Managing Network Requests

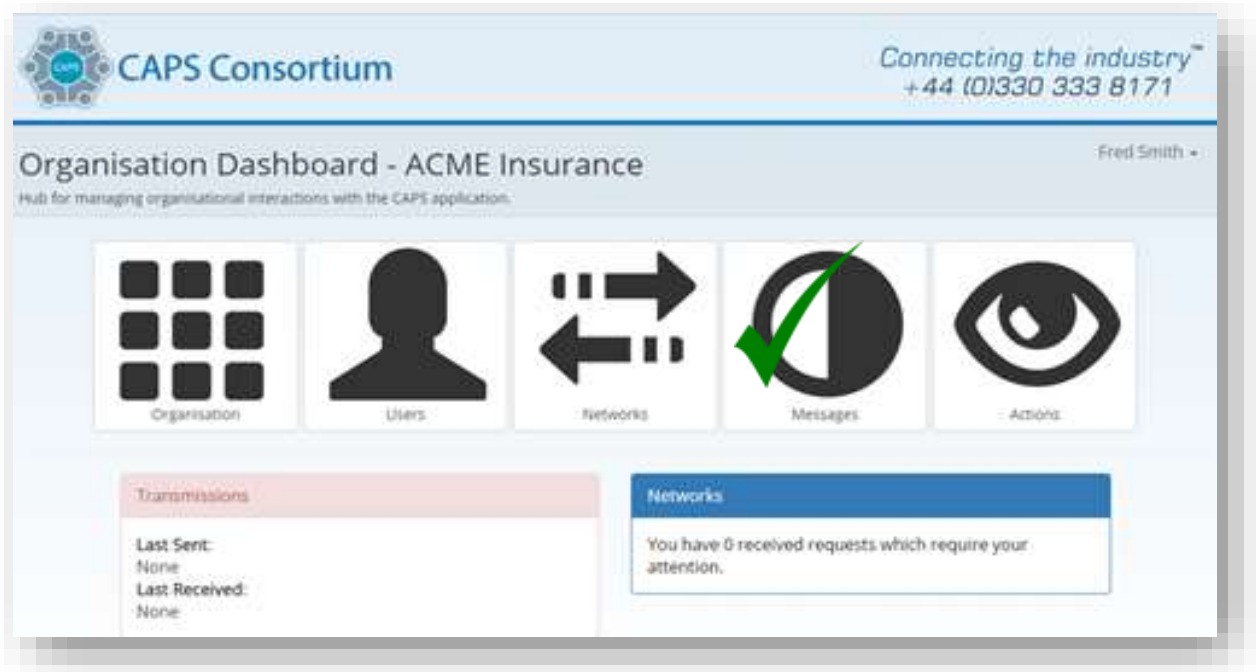
Your dashboard will also provide status updates on the number of ©CAPS Friendship Requests sent, accepted and or rejected.



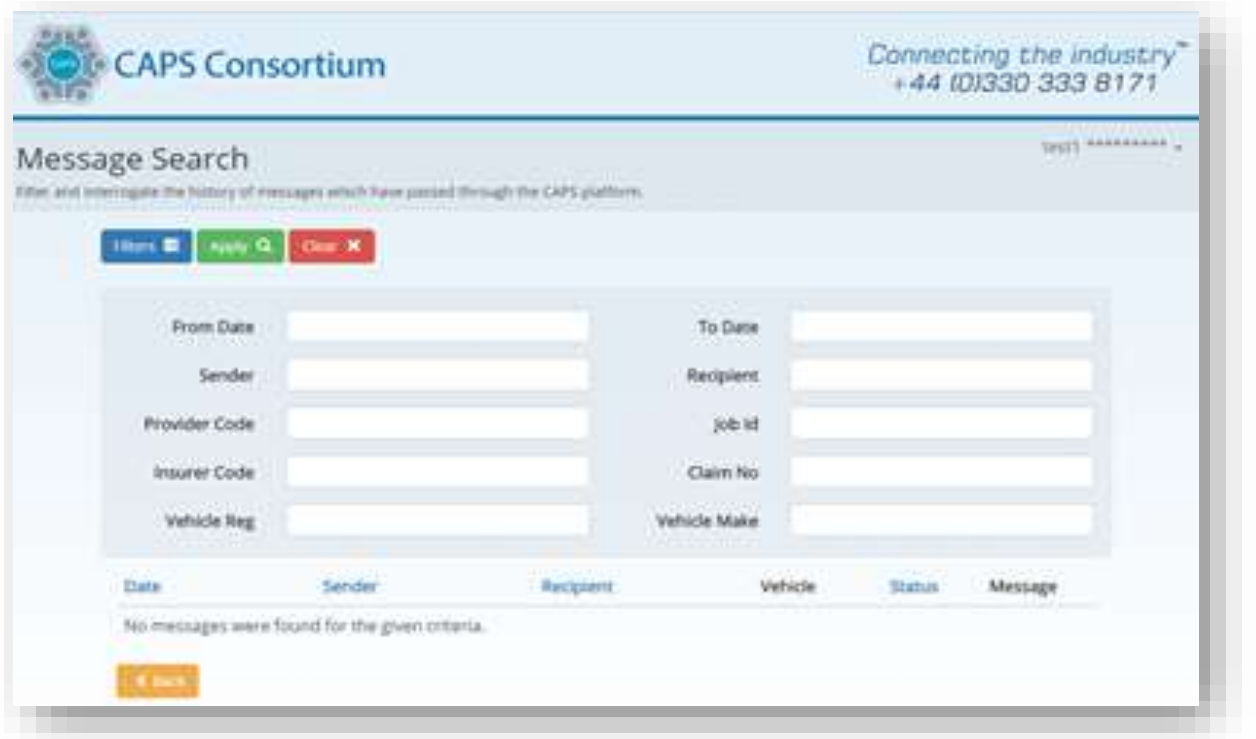
The screenshot shows the CAPS Consortium dashboard for managing network requests. The header includes the CAPS Consortium logo and the tagline "Connecting the industry™" with the phone number "+44 (0)330 333 8171". The main heading is "Manage Networks" with the subtext "Manage your Network Requests". There is a "User Name" dropdown menu. Below this, there are four tabs: "Received", "Sent", "Accepted", and "Rejected". The "Sent" tab is currently selected. The main content area displays the message "You have requested to exchange data with these organisations." followed by a table with columns "Network" and "Sent". The table is currently empty, showing "No records returned". At the bottom of the table area, there are three buttons: "Back", "New", and "Cancel". The footer of the dashboard shows "© 2017 Citrus Limited - v5.8.0.0".

## Messages

In this section of the dashboard you can view the transactions that have passed into and through CAPS. The information on this page also allows you to ensure your data is being exchanged and to show if data has been delayed or rejected. Your Body shops also have access to their organisational dashboard, allowing them to also see exchange traffic as well.

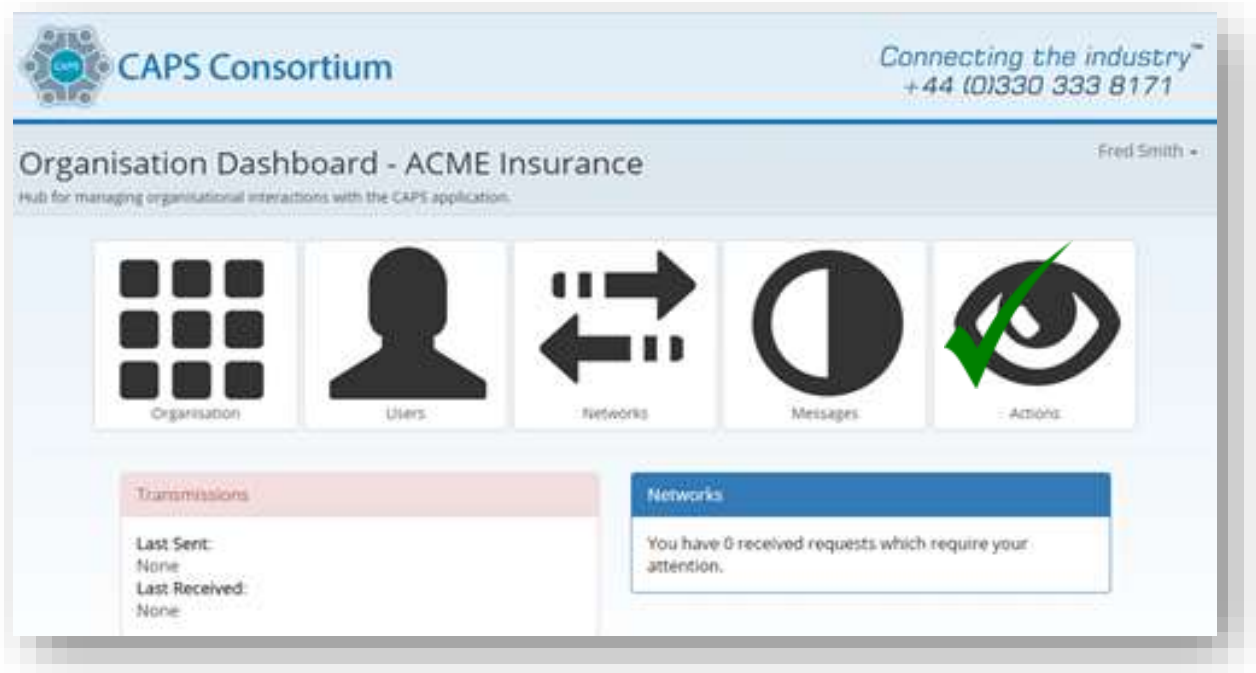


Use the filter button options to open the menu, to see if a job has passed through CAPS.



## Actions

In this section, it will show any actions that you or your users have undertaken.



Using the filter options will assist in the search if you have something specific you want to view.

