

CAPPS FINANCIALS FUNDAMENTALS

Financials Fundamentals

This course does NOT contain audio

This course is organized into four (4) sections. Learn how to use CAPPS Financial/Supply Chain functionality in each of the following sections:

- **Section 1** - Financials Overview
- **Section 2** - Getting Started
- **Section 3** - Using CAPPS
- **Section 4** - Conclusion

Introduction

After completing this course you will be able to:

- Summarize the CAPPS Project
- Identify CAPPS core modules and integration points
- Distinguish between ChartFields used in CAPPS Chart of Accounts
- Paraphrase the Procure-to-Pay Process
- Sign into CAPPS Financials via the Texas Enterprise Portal
- Change your password
- Use CAPPS Financials/Supply Chain basic navigation elements
- Work with CAPPS pages and fields
- Use the search page feature to retrieve information
- Describe effective dated rows
- Run a standard CAPPS report

Section 1 - Financials Overview

Section 1 - Objectives

After completing this section you will be able to:

- Describe General Terms
- Identify CAPPS core modules and explain integration points
- Distinguish between ChartFields used in CAPPS Chart of Accounts
- Summarize the Procure-to-Pay Process

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Section 1 - Outline

- General Overview and FSCM Module Integration
- Introduction to the Financial Chart of Accounts (COA)
- The Supply Chain Procure-to-Pay Process

Lesson 1

General Terms and FSCM Module Integration

- Learn about ProjectONE and CAPPS
- Crosswalk today's financial terms to CAPPS future terms
- Learn the CAPPS Financial Supply Chain Management (FSCM) modules and how they are integrated

ProjectONE

You may be wondering, what is ProjectONE?

It's our new enterprise. A single set of books for Texas!

ProjectONE is charged with implementing an Enterprise Resource Planning (ERP) solution for the State of Texas.

To learn more about ProjectONE visit the ProjectONE website at <http://www.txprojectone.org/>.

CAPPS

Now that you know what ProjectONE is, what is CAPPS?

CAPPS is the ERP solution for State of Texas designed and built by ProjectONE. CAPPS is an acronym for Centralized Accounting and Payroll/Personnel System.

CAPPS is a software solution that supports daily human resources, financial, and procurement operations for agencies statewide.

Section 1 – New Terms

Financial Terminology Crosswalk

TODAY'S TERMINOLOGY - Agency

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CAPPS TERMINOLOGY - *Company* - Company is a top-level designator that is equivalent to an Agency Number.

TODAY'S TERMINOLOGY - Budget Checking

CAPPS TERMINOLOGY - *Budgeting Checking* - Budget checking is a process. Its purpose is to validate that there are funds available in the budget before making a purchase. You will learn how budget checking is used and how it affects the budget later in this lesson.

TODAY'S TERMINOLOGY - Coding Block

CAPPS TERMINOLOGY – *ChartFields* - Are the fields and values that provide a common language for classifying organization's business transactions. ChartFields is also referred to as Chart of Accounts, ChartField String or Coding Block.

TODAY'S TERMINOLOGY - Department

CAPPS TERMINOLOGY – *Department* - A Department in CAPPS continues to identify an operational entity within an agency. Multiple departments can be organized by Business Unit.

TODAY'S TERMINOLOGY - Division

CAPPS TERMINOLOGY - *Business Unit (BU)* - The business level between company and departments that identifies divisions for reporting and operations. A BU value may include the agency number appended with two additional characters (e.g., **30400**).

TODAY'S TERMINOLOGY - Invoice

CAPPS TERMINOLOGY – *Voucher* - Vouchers are records that are created for the processing of supplier invoices, employee expenses or adjustments. A voucher is also created for items where payments are made without an invoice. Rent payments are a good example of a monthly payment where a supplier does not provide an invoice.

TODAY'S TERMINOLOGY - Vendor

CAPPS TERMINOLOGY - *Supplier* - Vendor/Supplier are used interchangeably, the Vendor/Supplier is the entity from whom goods and/or services are ordered.

Lesson 1 - Module Integration

CAPPS is an integrated system. Meaning information in CAPPS is shared or communicated across modules at an Agency. CAPPS core modules are Accounts Payable, Asset Management, Commitment Control, General Ledger, and Purchasing.

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Lesson 2 - Outline

Introduction to the Financial Chart of Accounts (COA)

- Learn the various ChartField values and how they are used.

Chart of Accounts

Question and answers regarding the Chart of Accounts:

Question: What is required by USAS?

Answer: Appn/PCA

Question: What captures transactions as Assets, Liabilities, Fund Equity, Revenues, and Expenditures?

Answer: Account

Question: What is an Appropriation Year?

Answer: Budget Reference

Question: What is the source of money related to a transaction?

Answer: Fund

Lesson 3 – Procure-to-Pay

The Supply Chain Procure-to-Pay Process

- Learn the Procure-to-Pay process. The process begins with the requisition in eProcurement and ends with the voucher in Accounts Payable.

Procure-to-Pay Process

Understanding the Procure-to-Pay Process

Pre-encumbrances, encumbrances, and expenditures are all a part of the budget checking process. This process ensures funds are available at the time a request is made.

What does it all mean?

First, I will explain how the budget is impacted by the budget checking process. Then, there will be a brief presentation to learn how the Procure-to-Pay process works.

Here is a simple Budget Status Chart summary that I will use to explain how pre-encumbrances, encumbrances, and expenditures affect the budget.

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Take a moment to review.

- The Beginning Balance on the budget is \$10,000.00.
- The pre-encumbrance amount is zero.
- The Encumbrance amount is zero.
- The Expenditure amount is zero.
- The Remaining Spending Authority is \$10,000.00.

Scenario One:

Nancy: “I created a requisition to order \$100 of office supplies.”

Nancy created a requisition to order \$100 of office supplies.

This is how the transaction affected her budget.

Nancy started with \$10,000 in her budget.

She pre-encumbered \$100 for office supplies.

Her total Remaining Spending Authority is \$9,900.

Scenario Two:

Nancy: “I wonder what happens to my requisition next.”

Nancy’s requisition will need to be sourced to a Purchase Order and budget checked.

Budgeting Checking a PO releases the pre-encumbrance and encumbers the funds of \$100.

The total available funds in the Budget remain the same, \$9,900.00

Scenario Three:

Nancy: “I received my supplies.”

Nancy received her supplies. Her supplier (vendor) has submitted their invoice to Accounts Payable.

Accounts Payable creates and budget checks a voucher. This releases the encumbrance and creates the expenditure of \$100.

The total available funds in the Budget remain the same, \$9,900.00.

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Scenario Four:

Now that you understand the Budget Checking process, take a few minutes to review how the Procure-to-Pay process works.

Financials Procure-to-Pay Process

Learning Objectives

After completing this brief demonstration you will be able to:

- 1) Understand the complete Procure-to-Pay Process within CAPPS
- 2) Identify where and how the Budget is impacted throughout the Procure-to-Pay Process.
- 3) Recognize the various Procure-to-Pay Roles and Responsibilities.

The Procure to Pay Process Timeline

- 1) Requisition - You create a Requisition to request a purchase of an item(s).
- 2) Purchase Order (PO) – Information is copied from the Requisition to the PO. There is no need for re-entry.
- 3) Receiving – The item is received from the supplier (vendor) or returned. The transaction is captured in CAPPS.
- 4) Accounts Payable (AP) – When an Invoice is received from a supplier a Payment Voucher is created.
- 5) USAS – Provides payment to the supplier (vendor).

Review the different types of CAPPS functionality relating to Purchasing.

Requisitions

- Requisitions can be created from eProcurement.
- A requisition line can reference an existing contract.
- Requisitions require approval based on an agency's management structure.
- Pre-encumber (place on hold) funds from the Budget.

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- May be created by anyone with the Requestor Role
Purchase Orders

Purchase Orders

- Information from a Requisition can be copied into a PO. No dual entry needed.
- Can be created without a Requisition (Direct PO) or from a contract
- Removes requisition pre-encumbrance and encumbers the funds from the Budget.
- Purchase Orders may require approval from a Manager.
- Purchase Orders may be created by anyone with the Buyer Role.

Receiving

- A record of items being received or still outstanding is captured in CAPPS.
- A record of items that were rejected upon delivery is captured.
- Suppliers forward invoices to Accounts Payable.
- May be received or returned by anyone with the Receiver role.

Accounts Payable

- In Accounts Payable a payment voucher is created.
- The payment voucher may require approval from a manager.
- Releases the PO encumbrance and creates an Expenditure entry in Budget.
- Automatically creates the General Ledger (GL) Journal entry.
- Automatically creates an Item in Asset Management.

USAS

- Creates the Payment for Supplier (Vendor)

Learn your role in CAPPS by reviewing the task that you perform today. The tasks and their roles are following:

- Task – Purchase Items or Services
 - Role – You are a Requestor. Requestors create a requisition to purchase items/goods. Recommended training class(es) are: 999 Financials Fundamentals and 305 Requisitioning and Receiving.

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- Task – Manage Purchase Orders (PO)
 - Role – You are a Buyer. Buyers create, budget check, and dispatch Purchase Orders. Recommended training class(es) are: 999 Financials Fundamentals, 305 Requisitioning & Receiving, 306 Purchase Order Processing.
- Task – Approve Requisitions or POs
 - Role – You are an Approver. Approvers can approve Requisitions and/or Purchase orders. Recommended training class(es) are: 999 Financial Fundamentals and 310 Requisitioning Approval.
- Task – Receive Items or Goods
 - Role – You are a Receiver. Receivers enter a receipt of items and services delivered to the Agency. Recommended training classes) are: 999 Financials Fundamentals and 305 Requisitioning & Receiving.
- Task – Process Supplier Invoices
 - Role – You are an Accounts Payable Clerk. AP clerks process invoices and create Payment Vouchers. Recommended training class(es) are: 999 Financial Fundamentals and 200 Accounts Payable.

Hope you enjoyed learning about the process! Let's go back to the course!

Section 2

Getting Started

Section 2 - Objectives

After completing this section you will be able to:

- Sign into the CAPPS application
- Recognize and use CAPPS navigation features
- Add a navigation path to your Favorites
- Use the search feature to retrieve information
- Describe how to use Operators and Wildcards in a search

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Section 2 - Outline

Accessing CAPPS

Using CAPPS Navigation Features

Using the Search Feature to Retrieve Information

Section 2 - Lesson 1

Accessing CAPPS

- Learn how to log into CAPPS using the Portal
- Learn how to change your password

Lesson 1 - Sign-In

Learning a new system can be a bit puzzling at first.

Meet Carol.

Hello I'm Carol. I going to help you get started. Together we are going to learn how to sign-in to CAPPS.

Lesson 1 – Exercises – How to Access CAPPS

This lesson will help you get started with CAPPS HR/Payroll.

You will learn:

- How to sign-in to CAPPS
- How to Change Your Password

Since this will be your first exercise, it is a good idea to review the Quick Reference Guide on how to complete an exercise first. Use the [Quick Reference Guide link](#).

When you are ready, take a moment to complete the exercise scenarios:

[View Section 2 – Lesson 1 Exercises](#)

Exercises are completed independently at your own pace and therefore do not contain sound. Once you have completed the exercise, close the window by clicking on the 'X' in the upper right-hand corner of the browser to return to the course.

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Section 2 - Lesson 2 – Exercises

Using CAPPS Navigation Features

- Learn the basic structure of CAPPS
- Learn how to use basic navigation features
- Learn how information is organized in pages

Lesson 2, Step 1 (Go)

Understanding CAPPS Basic Structure

Understanding how CAPPS is structured will help make using CAPPS easy. Every time you access CAPPS you will complete three simple steps: Go, Tell, and Do.

Step 1 (Go) - Use the Navigation Menus to go to the right area in CAPPS. You can do this by asking yourself, “What is it that I want to do?”

For example: If an accounting clerk wanted to update a journal entry, they would navigate to the Create/Update Journal Entries page. You will learn more about this later.

Lesson 2, Step 2 (Tell)

Tell CAPPS what you need.

When you reach the end of your navigation menus a search page will automatically display.

Think of it like this, the search page is asking you to specify what information is it that you need?

For instance, in the example in Step 1 you followed the navigation menus to the Create/Update Journal Entries page. The search page is now asking you the specific journal you need.

Lesson 2, Step 3 (Do)

Perform the task needed in CAPPS pages.

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Once you have told CAPPS what information you need, CAPPS will retrieve the information and display it on a page.

You will learn how to view, add, and update information on pages later in this course.

Go, Tell, Do. It really is that easy. Let me show you.

Navigation Menus

We will start with Step 1 (Go) and learn how to use the Navigation Menus.

Understanding how to move around in CAPPS is essential for every user. CAPPS HR/Payroll allows you to view, add, or update information. All information in CAPPS is accessed by selecting an applicable Navigation Menu option.

There are two ways you can use the Navigation Menus to locate data.

- A. Using the drop down arrow from the Main Menu.
- B. Using a breadcrumb

It is important to note that not all menus are available to every user. You will have access only to the menus that are applicable to your daily job task. Access to menus is provided through security.

Let's take a moment to review each navigation menu option.

Main Menu

The second way that you can navigate in CAPPS is by using the **Menu** Navigation.

The drop down menu navigation displays a linear view of the menu options available to you. Remember, menu options are controlled by security. Your menu options may display differently.

Breadcrumbs

The third way that you can navigate in CAPPS is by using the **Breadcrumbs**.

No matter how you choose to navigate through CAPPS a trail of breadcrumbs will appear at the top of the page marking the path where you have traveled.

Any location on a Breadcrumb can be used as a navigational starting point. In other words, it is not necessary to always go all the way back to the Main Menu when

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navigating through the system. Simply pick the applicable start point and you are on your way.

Tell CAPPS What You Need

Step 2 (Tell) - Tell CAPPS What You Need

Search pages allow you to tell CAPPS what you need. All you do is enter your search criteria to answer the question, “What information do you want to view?”

Multiple Search Criteria

Not all Search Pages are the same.

Some Search Pages provide several options for entering search criteria.

You can search according to any of the Search Criteria options listed on the Search Page.

You will learn more about how to search for information in CAPPS later in the course.

Add a New Value Tab

Some Search Pages display the “**Add a New Value**” tab. This tab allows you to add additional information in CAPPS.

It is important to note that not all users will have security access to this functionality.

Perform the Task Needed

Step 3 (Do) - Perform the Task Needed

All content within CAPPS is displayed in a page. Pages present information in a variety of ways, including: tabs, grids, fields, text boxes, rows, etc. A page is where you view information or complete a task.

For example: Employees will use the Employee Timesheet page to report timekeeping activities, such as entering additional time worked or leave time taken. *You will learn how to report hours in the Employee Timesheet later in this course.*

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Next you are going to learn about the key elements that are contained on a page.

Components

Components in CAPPS contain multiple pages. The pages are then organized by Tabs. Within each Tab data may be organized in separate Grids.

This component has two pages (Contact Address/Phone and Other Phone Numbers). Components may contain several pages.

Tabs

Tabs are used to separate content into pages with in the same component. You use tabs to navigate from page to page within the component.

Grids

Grids are used to separate data on a page. Grids appear as a blue box with a navigation bar across the top.

Each Grid has its own unique navigation bar. There may be more than one Grid on a page.

Embedded Grids

Grids can contain other Grids. This is known as Embedded Grids

Whenever there are multiple grids on a page, be sure to use the correct navigation bar. This can be tricky. Multiple navigation bars may exist. One for the Emergency Contact grid and one for the other Phone Numbers for Emergency Contact grid. This depends on the components displayed.

Grid Tabs & Views

Grids can also contain Tabs. Some grids can be collapsed and expanded to hide or view information.

Grid Navigation Bar

Grids can also contain more than one record.

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Expand Columns Icon

The Expand Columns Icon aka Show All Columns Icon to allow the user to view all of the fields on the line. When you are done viewing the extra columns click on the icon again and it will return the page to the original view.

Add Feature

Moving on, you'll be introduced to the features using the Add, Edit, Delete and Save buttons.

Add Button

Add buttons are located throughout CAPPS and may contain different label names. Selecting an Add button allows you to add a new row of information to the CAPPS system.

It is important to note when adding new information, that information will not actually be added to the CAPPS system until you select the Save button.

Edit Feature

Edit Pencil or Button

The edit pencil, or sometimes displayed as a button, allows you to change information that already exists in CAPPS.

Delete Feature

Delete Button

The Delete button or garbage can allows you to delete information from CAPPS.

Save Feature

Save Button

Use the Save button whenever you are adding, updating, or deleting information in CAPPS. It is very important that you remember to save your work before navigating to a new component or page.

If you do not save, your work will be lost.

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It is important to note that the system will timeout when you have stopped working for a period of time. Be sure to save your work before leaving your desk to avoid losing your work due to the system timing out.

Field Labels

And finally, you'll be introduced to various fields, boxes, symbols and buttons.

Field Labels

A Field Label is the name of the field.

Asterisks

When an asterisk (star) is use with a field name, it is a required field. This means you must enter the applicable information before CAPPS will allow you to save your work.

Add & Delete Icons

The Add (plus) a new row and Delete (minus) a row buttons allow you to add or delete information.

Edit Box with Prompt

This field will only accept specific values. Use the magnifying glass (look up icon) to view acceptable values.

Free-Form Edit Box

An edit box is a rectangular box into which you enter data. The number of characters you can enter is usually determined by the length of the field.

An edit box will typically accept any alpha, numeric, or special characters, and usually there is no validation of data in a free-form text field.

Date Field

The Date Field requires a date value to be entered. It has a special date prompt button, which looks like a calendar page icon. You can type the applicable date or use the calendar icon to select a date.

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List Box

The field has a list of specific values that may be used. You can click the down arrow to display a list of values from which you can select a single option.

Radio Button

A radio button is a small round button representing one option in a group of mutually exclusive options. Only one radio button in a group can be selected (or ON) at a time.

Check Box

A checkbox is a small square box that turns an option On or Off.

Select the box by clicking on it, and the system adds a check mark to the box, and turns this option ON. Click on the box again, and the system removes the check mark, and turns the option OFF.

Lesson 2 - Exercises

Now that you have completed the 'Using CAPPS Navigation Features' section, let's complete an exercise. In this exercise you will experience first-hand what you just learned while learning how to add and delete a favorite.

When you are ready select this link [View Section 2 – Lesson 2 Exercises](#).

Exercises are completed independently at your own pace. Once you have completed the exercise, close the window by clicking on the 'X' in the upper right-hand corner of the browser to return to the course.

If you need assistance on how to complete an exercise, access the [Quick Reference Guide](#).

Lesson 3

Using the Search Feature to Retrieve Information

- Learn the difference between a Basic search and an Advanced search
- Learn how to identify search criteria
- Learn how to use Operators and Wildcards to narrow your search results

Search Definitions

Basic Search

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A Basic search allows you to search using one criterion from the search list box.

Advanced Search

An Advanced search allows you to search for information using one or more criteria from several search list boxes.

Search Criteria

Search Criteria

A search criteria is simply what value you are using to search. For example: you could search for an employee by their Empl ID (Employee ID).

The dropdown arrow for the 'Search by' list box will display the criteria that may be used.

Wildcards

Wildcards

A Wildcard can help you search for information when you are unsure of how it is listed in CAPPS. The Percent Sign (%) can be used as a Wildcard. It matches one or more characters in your search request.

An example would be if you were unsure how to spell the employee's last name. Here you enter the information that you knew followed by the % wildcard. For example: **'Employee A%'**.

As a result, a list of potential records is returned where the employee's last name begins with 'Employee A'. From here you can select the applicable record.

Operators

Operators can only be used during an Advanced search. They allow you to further define your search. They are accessed using the dropdown arrow of a list box.

Lesson 3 Exercises

Let's complete an exercise. In this exercise you will experience first-hand what you just learned.

When you are ready select this link [View Section 2 – Lesson 3 Exercises](#).

Exercises are completed independently at your own pace. Once you have completed

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the exercise, close the window by clicking on the 'X' in the upper right-hand corner of the browser to return to the course.

If you need assistance on how to complete an exercise, access the [Quick Reference Guide](#).

Section 3

Using CAPPS Key Concepts

Objectives

After completing this section you will be able to:

- Define 'Effective Dating' and how it is used.
- Recognize 'Action Types' used to retrieve information
- Repeat the six steps required to run a CAPPS Report

Outline

- Key Concepts for Adding and Updating Data
- Reports

Adding and Updating

Adding and Updating Data

- Key Concept: Learn how Effective Dating is used
- Key Concept: Learn how to retrieve future, current, and history rows of data

Effective Dated Rows

What is an Effective Dated Row?

Effective Dated Rows are rows of information (or transaction activity) being tracked in CAPPS according to the date the transaction was saved.

What is it used for?

Effective Dated rows are used to preserve the history of a transaction.

How does it work?

CAPPS saves the transaction with the date it occurred. Then it classifies the row according to one of three categories:

- A Current Row

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- A Future Row
- A History Row

Current Row

In CAPPS, a **current** row of data displays the most up-to-date information available.

It is important to note that this row will not always reflect 'today's date'; it will reflect the date the transaction was last updated.

Only one row can be the current row. When a new row is added that is not future dated, it becomes the new **current** row.

Future Dated Row

In CAPPS, you can save information with a date beyond today's date (current date). The transaction is then scheduled to become effective when the **future** date arrives. This is called a future dated row.

When the date of a **future** row arrives, it becomes the **current** row.

History Dated Row

History includes all rows with an effective date prior to the effective date on the **current** row.

Historical rows provide the history of a transaction.

Retrieving Data

Retrieving Rows of Information

When retrieving rows of information, how do I know what to select? Current, Future or History rows.

How do I specify what type of information I want?

Action buttons are located at the bottom of a CAPPS page.

Action buttons are Add, Update/Display or Include History

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You use the **Add** button when new information is being added to CAPPS (e.g. adding a new vendor, customer, requisition, purchase order, voucher, asset, etc.)

The **Update/Display** button is used when retrieving or updating data on non-effective dated rows.

If the row is effective dated, you can retrieve the row, but you cannot update/modify it without inserting a new row first. With this action you can view **current** and **future** rows, modify **future** rows only, or insert a new **current** or **future** row.

When you view data using the **Include History** button, you will view **current**, **future** and **history** rows of data. This is helpful when you need to view historical data pertaining to a transaction.

Exercise – Lesson 1

Now that you have completed the ‘Using CAPPS Key Concepts’ section, let’s complete an exercise. In this exercise you will experience first-hand what you just learned while learning about effective dating and action types.

When you are ready select this link [View Section 3 – Lesson 1 Exercise](#).

Exercises are completed independently at your own pace. Once you have completed the exercise, close the window by clicking on the ‘X’ in the upper right-hand corner of the browser to return to the course.

If you need assistance on how to complete an exercise, access the [Quick Reference Guide](#).

Run a Report

Reports

Running a report using the Process Scheduler is six simple steps. The same steps can be used no matter what type of report that you are going to run.

In this lesson you will learn the six steps required to run a report.

1. Navigate to the report
2. Enter a Run Control ID, or create a new one
3. Select the parameters of the report
4. Select the Run button
5. Navigate to the Process Monitor to view the status of the report

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6. Navigate to the report

Exercise – Lesson 2

In this exercise you will experience first-hand what you just learned while learning about running reports.

When you are ready select this link [View Section 3 – Lesson 2 Exercise](#).

Exercises are completed independently at your own pace. Once you have completed the exercise, close the window by clicking on the 'X' in the upper right-hand corner of the browser to return to the course.

If you need assistance on how to complete an exercise, access the [Quick Reference Guide](#).

Section 4

Conclusion

Course Summary

Congratulations, you have completed this course. You learned the following in this course:

- How to summarize the CAPPS Project
- How to identify CAPPS core modules and integration points
- How to distinguish between ChartFields used in CAPPS Chart of Accounts
- How to paraphrase the Procure-to-Pay Process
- How to sign-in to CAPPS Financials via the Texas Enterprise Portal
- How to change your password
- How to use CAPPS Financials basic navigation features
- How to work with CAPPS menus, pages and fields
- How to use the search page feature to retrieve information
- How to use effective dated rows
- How to run a standard CAPPS report

You are now ready to move on to your next course, see you there!

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End

Conclusion

This completes the course.

Hope you enjoyed this course, see you next time!