



How to Request Access to CAPPS FIN

The HHS Enterprise Portal

About This Document

This document is interactive. Use the navigation buttons at the bottom of the screen to move through the document. Some pages may ask you to click on a specific part of the screen to view the next step.

Type a keyword(s) in the search bar of your pdf viewer to find a specific topic.

Before You Begin

This document addresses the specific steps for requesting CAPPS FIN access through the HHS Enterprise Portal, with the assumption that you are already a portal user, and familiar with requesting access to other applications through the portal.

If this is not the case, please refer to the following links for further information.

[How to register for the HHS Enterprise Portal](#)

[How to request access to HHS applications through the portal](#)

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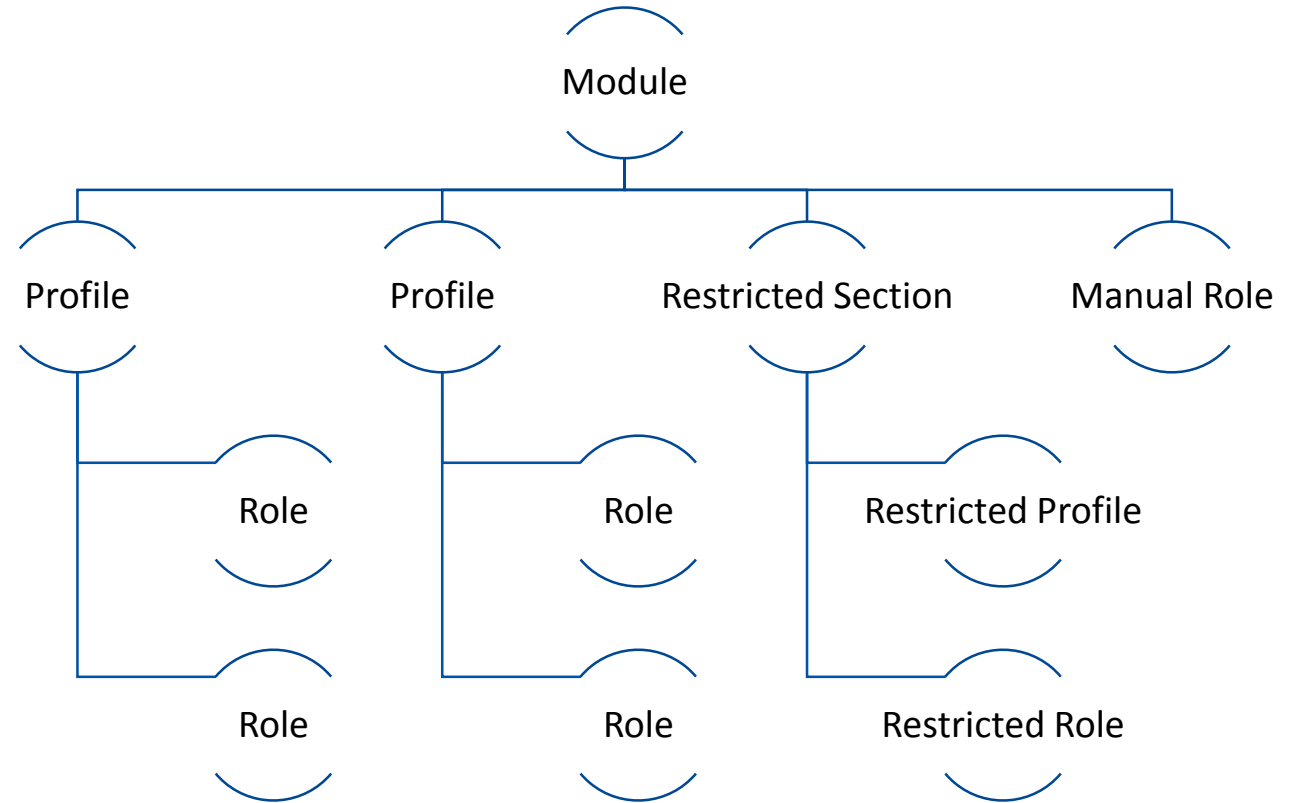
About Profile-Based Access

CAPPS FIN access is organized by modules.

Each module contains a specific list of profiles.

When you select a profile, its roles and other layers of access will automatically be assigned to you.

Most modules also contain individual roles that you can add manually for a more customized access, as well as a section for requesting restricted access. Restricted access requires a justification if selected.



Inquiry Roles

Inquiry Roles are selected by default. If this is the only type of access that you require, scroll to the bottom of the page and select **Next** to return to your cart.

CAPPS FIN Inquiry Only

Inquiry Only Roles	Description
<input checked="" type="checkbox"/> A_AC_COMMON	Access to general menus and screens.
<input checked="" type="checkbox"/> A_AC_FIN_INQUIRY	Inquiry access to most CAPPS FIN modules.
<input checked="" type="checkbox"/> A_RT_PROF_OTHER_USERS	Provides ability to run queries and access most reports in reporting database.

If no additional roles are required, please skip to the bottom of the page and click next.

Modules

Select a module to view its profiles, manual roles, and restricted access options.

Accounts
Payable

Asset
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ePro/ Strategic
Sourcing/
Supplier
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General Ledger

MIMS

Purchasing

Reporting

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Accounts Payable –Intro

The Accounts Payable or AP module records vendor invoices (vouchers), and aligns with the Purchasing and Receiving modules to ensure timely payment to vendors. Access options vary depending on your agency.

Profiles	Description
<input type="checkbox"/> AP LEVEL 1 SUPPORT	Provide AP Support-adjust POs, create standard comments.
<input type="checkbox"/> FACILITY APPROVAL	Facilities only: Voucher approval Level 2 and Level 3.
<input type="checkbox"/> PAYCYCLE	Restricted access to maintain paycycles.
<input type="checkbox"/> REGIONAL APPROVAL	Regional Office only: Voucher approval Level 2.
<input type="checkbox"/> STATE OFFICE APPROVAL	State Office only: Enter/approve vouchers Level 2 & Level 3 for origin ALL. KK Unlock Source Hdr access.
<input type="checkbox"/> VENDOR ENTRY	Enter Vendors and make updates. No other access provided.
<input type="checkbox"/> VOUCHER ENTRY ALL LOCATIONS	Enter/approve vouchers Level 1 for all locations.

Options for Accounts Payable vary depending on your agency. Select your agency.

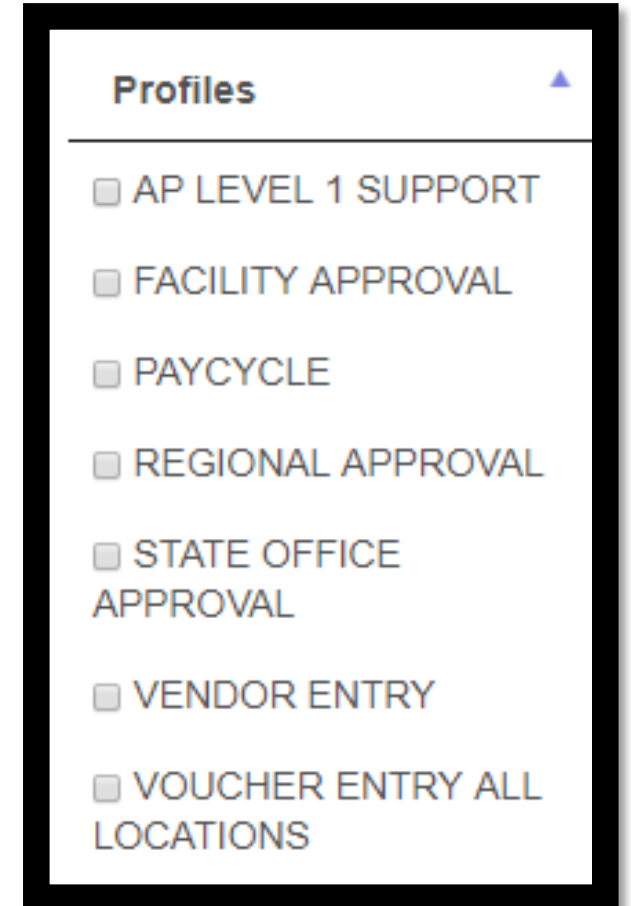
HHSC

DFPS

DSHS

Accounts Payable – HHSC Profiles

- The **AP Level I Support profile** is a high level access profile, allowing you access to many areas within AP for research and support. It also allow you to adjust purchase orders, enter standard comments, and much more. This profile is for an AP user that provides support to other users for their AP use and subject matter experts within AP.
- Select **Facility Approval** if you will be approving vouchers at a facility level, and specifically NOT for home office. This profile has level 2 and 3 voucher approval authority for your origin. Selecting this profile requires you to enter at least one voucher approver level under origin route control.
- The **Paycycle** profile provides you restricted access to maintain paycycles.
- Select **Regional Approval** if your job requires you to approve vouchers AP privileges at a regional level. This profile has level 2 voucher approving authority for your specific origin.
- Select the **State Office Approval** profile if your job requires you to approve vouchers at a state office level. This profile has level 2 and 3 voucher approval authority for all origins.
- Select the **Vendor Entry** profile if you need the ability to enter and maintain vendors.
- Selecting **Voucher Entry All Locations** allows you to enter and approve Level one vouchers for all locations. You are required to enter at least one voucher approver level under origin route control and a single voucher entry origin.

A screenshot of a web application interface titled "Profiles" with a blue triangle icon to its right. Below the title is a horizontal line. Underneath, there is a list of seven profile options, each preceded by a small square checkbox. The options are: "AP LEVEL 1 SUPPORT", "FACILITY APPROVAL", "PAYCYCLE", "REGIONAL APPROVAL", "STATE OFFICE APPROVAL", "VENDOR ENTRY", and "VOUCHER ENTRY ALL LOCATIONS".

Profiles
<input type="checkbox"/> AP LEVEL 1 SUPPORT
<input type="checkbox"/> FACILITY APPROVAL
<input type="checkbox"/> PAYCYCLE
<input type="checkbox"/> REGIONAL APPROVAL
<input type="checkbox"/> STATE OFFICE APPROVAL
<input type="checkbox"/> VENDOR ENTRY
<input type="checkbox"/> VOUCHER ENTRY ALL LOCATIONS

Accounts Payable – HHSC Manual Roles & Restricted Access

- Select **A_AP_VCHR_BUILD** to be able to process voucher builds.
- Select **A_AP_VCHR_CLOSE** if you require the ability to close vouchers.
- You can also select the “**Voucher_Reversal**” preference, which will allow to utilize the Reversal Style Voucher Template.

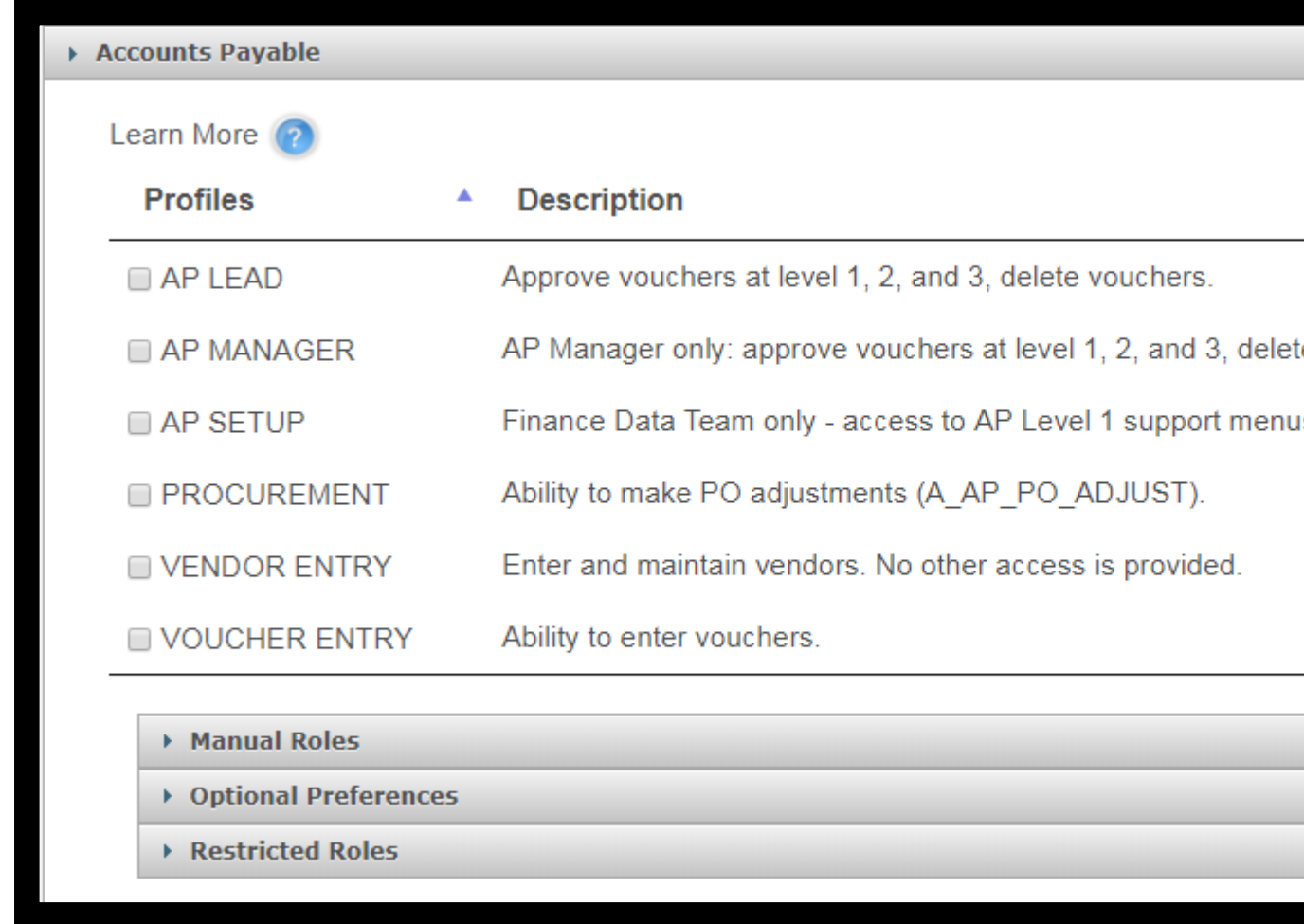
All restricted roles and rules require justification if selected.

- Select **A_AP_FIN_APPROVER** to update and approve account payable vouchers.
- Select **A_AP_FIN_MANAGER** to update and approve vouchers, and access all areas of AP Management.
- The **A_AP_SETUP** role provides you the ability to establish and maintain account payable parameters. This is for a high level user that may also provide AP support.
- The **A_AP_VCHR_UNPOST** role gives you the ability to unpost vouchers from the system.
- **BUDG_DT_AP** commitment control rule provides budget date override access.
- **OVRD_AP** commitment control rule provides AP budget override access.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_AP_VCHR_BUILD	Voucher Build
<input type="checkbox"/> A_AP_VCHR_CLOSE	Voucher Close Ability
Optional Preferences	
Preferences	Description
<input type="checkbox"/> VOUCHER_REVERSAL	Allows user to utilize Reversal Style Voucher Template
Restricted Roles	
Roles	Description
<input type="checkbox"/> A_AP_FIN_APPROVER	Update/Approve Vouchers
<input type="checkbox"/> A_AP_FIN_MANAGER	Update/Approve Vouchers
<input type="checkbox"/> A_AP_SETUP	Setup and maintain AP parameters
<input type="checkbox"/> A_AP_VCHR_UNPOST	Allows user to unpost vouchers
Rules	Description
<input type="checkbox"/> BUDG_DT_AP	Commitment Control Rule - AP Budget Date Override
<input type="checkbox"/> OVRD_AP	Commitment Control Rule - AP Budget Override

Accounts Payable – DFPS Profiles

- Select **AP LEAD** to approve vouchers at level 1, 2, and 3, and delete vouchers.
- Select **AP MANAGER** to approve vouchers at level 1, 2, and 3, and delete/close vouchers. (AP Manager only)
- Select **AP SETUP (Finance Data Team)** for access to AP Level 1 support menus and setup options. (FDT only)
- Select **PROCUREMENT** for the ability to make purchase order adjustments.
- Select **VENDOR ENTRY** to have the ability to enter and maintain vendors. No other access is provided.
- Select **VOUCHER ENTRY** to have the ability to enter vouchers.

A screenshot of a web application interface titled "Accounts Payable". It features a "Learn More" link with a question mark icon. Below is a table with two columns: "Profiles" and "Description". The table lists six profiles: AP LEAD, AP MANAGER, AP SETUP, PROCUREMENT, VENDOR ENTRY, and VOUCHER ENTRY, each with a checkbox and a description of its permissions. At the bottom, there are three expandable sections: "Manual Roles", "Optional Preferences", and "Restricted Roles".

Accounts Payable	
Learn More ?	
Profiles	Description
<input type="checkbox"/> AP LEAD	Approve vouchers at level 1, 2, and 3, delete vouchers.
<input type="checkbox"/> AP MANAGER	AP Manager only: approve vouchers at level 1, 2, and 3, delete/close vouchers.
<input type="checkbox"/> AP SETUP	Finance Data Team only - access to AP Level 1 support menus and setup options.
<input type="checkbox"/> PROCUREMENT	Ability to make PO adjustments (A_AP_PO_ADJUST).
<input type="checkbox"/> VENDOR ENTRY	Enter and maintain vendors. No other access is provided.
<input type="checkbox"/> VOUCHER ENTRY	Ability to enter vouchers.
Manual Roles	
Optional Preferences	
Restricted Roles	

Accounts Payable – DFPS Manual Roles & Restricted Access

Manual Roles

- Select **A_AP_PAYCYCLE** to process Advance Travel Checks.
- Select **A_AP_STANDARD_COMMENTS** to add or update standard comments.
- Select **A_AP_UNLOCK_KK_SOURCE_HDR** to unlock AP Commitment Control Voucher Locked by Budget Check
- Select **A_AP_VCHR_BUILD** to access the Voucher Build process.

Optional Preferences

Select **VOUCHER_REVERSAL** to gain access for utilizing the Reversal Style Voucher Template.

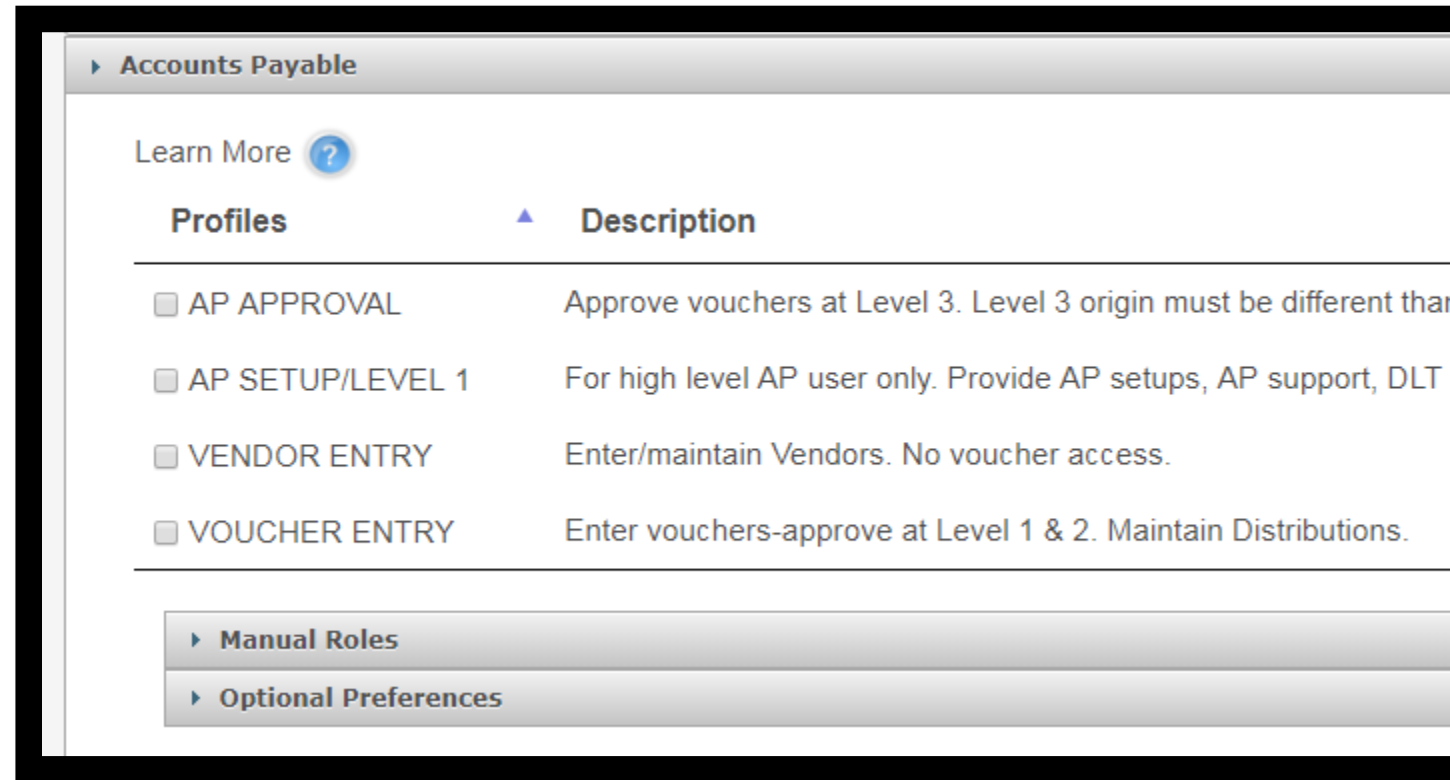
Restricted Access

Select **A_AP_VCHR_UNPOST** for the ability to unpost vouchers.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_AP_PAYCYCLE	Process Advance Travel Checks.
<input type="checkbox"/> A_AP_STANDARD_COMMENTS	Add/Update Standard Comments.
<input type="checkbox"/> A_AP_UNLOCK_KK_SOURCE_HDR	Unlock AP Commitment Control Vou
<input type="checkbox"/> A_AP_VCHR_BUILD	Voucher Build Process.
Optional Preferences	
Preferences	Description
<input type="checkbox"/> VOUCHER_REVERSAL	Allows user to utilize Reversal Style Vou
Restricted Roles	
Roles	Description
<input type="checkbox"/> A_AP_VCHR_UNPOST	Allows user to unpost vouc

Accounts Payable – DSHS Profiles

- Select **AP APPROVAL** for the ability to approve vouchers at Level 3. (Level 3 origin must be different than Level 2.)
- Select **AP SETUP/LEVEL 1** for access to AP setups, AP support, DLT comment setup. This profile is for high-level AP users only.
- Select **VENDOR ENTRY** to have the ability to enter and maintain vendors. No other access is provided.
- Select **VOUCHER ENTRY** to have the ability to enter vouchers at Level 1 & 2.



Accounts Payable – DSHS Manual Roles & Optional Preferences

Manual Roles

- Select **A_AP_FIN_MANAGER** to update and approve vouchers.
- Select **A_AP_PAYCYCLE** to process Advance Travel Checks.
- Select **A_AP_UNLOCK_KK_SOURCE_HDR** to unlock AP Voucher Locked by Budget Check.
- Select **A_AP_VCHR_BUILD** to access the voucher build process.
- Select **A_AP_VCHR_CLOSE** to close vouchers.
- Select **A_AP_VCHR_DELETE** to delete vouchers.
- Select **A_AP_VCHR_UNPOST** for the ability to unpost Vouchers.

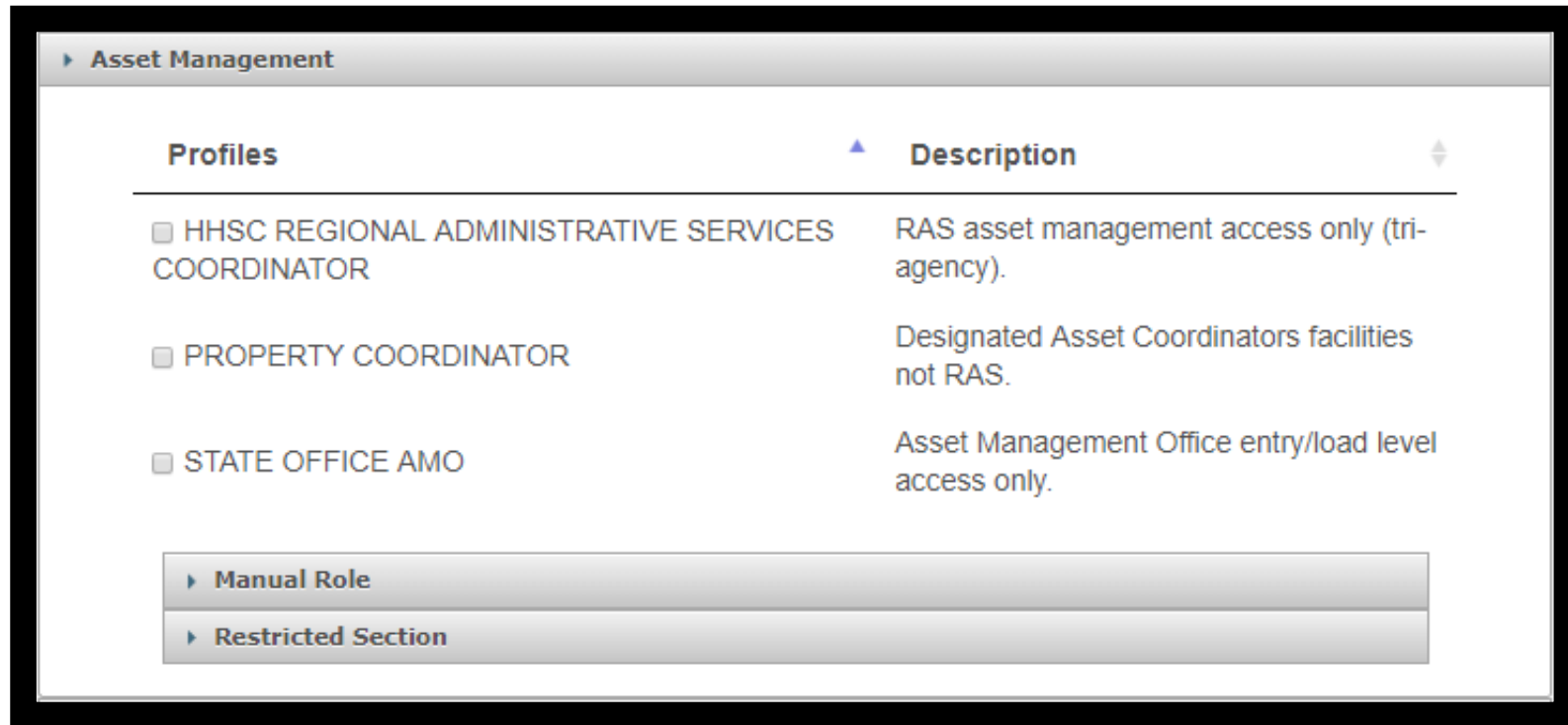
Optional Preferences

- Select **BUDG_DT_AP** for the ability to override budget dates.
- Select **OVRD_AP** for the ability to override budgets.
- Select **VOUCHER_REVERSAL** to gain access for utilizing the Reversal Style Voucher Template.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_AP_FIN_MANAGER	Update/Approve Vouchers.
<input type="checkbox"/> A_AP_PAYCYCLE	Process Advance Travel Che
<input type="checkbox"/> A_AP_UNLOCK_KK_SOURCE_HDR	Unlock AP Voucher Locked b
<input type="checkbox"/> A_AP_VCHR_BUILD	Voucher Build process.
<input type="checkbox"/> A_AP_VCHR_CLOSE	Close Vouchers.
<input type="checkbox"/> A_AP_VCHR_DELETE	Delete Vouchers.
<input type="checkbox"/> A_AP_VCHR_UNPOST	Unpost Vouchers.
Optional Preferences	
Preferences	Description
<input type="checkbox"/> BUDG_DT_AP	Budget Date Override.
<input type="checkbox"/> OVRD_AP	Budget Override.
<input type="checkbox"/> VOUCHER_REVERSAL	Allows user to utilize Reversal Style Voucher

Asset Management – INTRO

The Asset Management or AM Module is used to track assets throughout their lifecycle; from acquisition to retirement. The profiles found in the Asset Management module perform various tasks that help with asset tracking, asset management, and assist in planning for future asset needs. Selecting any asset management profile requires you to enter an asset region or sector in the field provided. If you do not know the code, please contact your Supervisor.



The screenshot displays a web application window titled "Asset Management". Inside, there is a table with two columns: "Profiles" and "Description". The table lists three profiles, each with an unchecked checkbox in the "Profiles" column. Below the table, there are two expandable sections: "Manual Role" and "Restricted Section", both currently collapsed.

Profiles	Description
<input type="checkbox"/> HHSC REGIONAL ADMINISTRATIVE SERVICES COORDINATOR	RAS asset management access only (tri-agency).
<input type="checkbox"/> PROPERTY COORDINATOR	Designated Asset Coordinators facilities not RAS.
<input type="checkbox"/> STATE OFFICE AMO	Asset Management Office entry/load level access only.

▶ Manual Role

▶ Restricted Section

Asset Management – All Access

- The **State Office Asset Management Office (State Office AMO)** profile allows you to update, enter, dispose, and upload data.
- The **Property Coordinator** profile should be assigned to designated Asset Coordinators outside Regional areas. Role allows updates to custodian, location, and comments.
- The **HHSC Regional Administrative Services Coordinator** profile provides access to RAS asset management in support of multiple agencies.
- The manual role, **A_AM_COMMENTS_UPDATE**, gives you inquiry asset management access with update for comments.

Restricted Roles

The restricted section require justification for access.

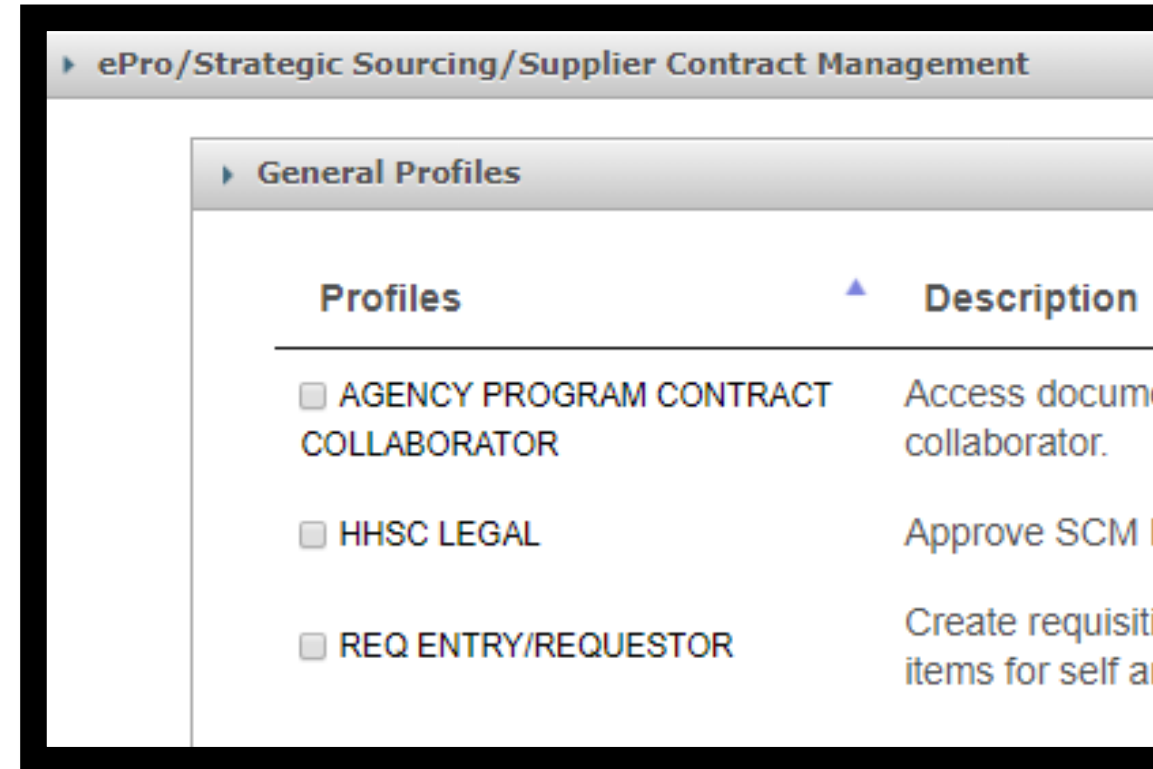
- The **A_AM_LEVEL1_SUPPORT** role can only be assigned users who are State Office Asset Management Level 1. Users with this role would be subject matter experts in the AM module as this role provides access to pages for AM used for troubleshooting and processing.
- The **State Office Administrator** profile is restricted to designated State Office Asset Management Offices Staff only. Access is defaulted to ALL asset region or sector if you select this profile.

Profiles	Description
<input type="checkbox"/> HHSC REGIONAL ADMINISTRATIVE SERVICES COORDINATOR	RAS asset management (agency).
<input type="checkbox"/> PROPERTY COORDINATOR	Designated Asset Management not RAS.
<input type="checkbox"/> STATE OFFICE AMO	Asset Management access only.
Manual Role	
Roles	Description
<input type="checkbox"/> A_AM_COMMENTS_UPDATE	Asset Management Comments
Restricted Section	
Roles	Description
<input type="checkbox"/> A_AM_LEVEL1_SUPPORT	State Office Asset Management Level 1
Profiles	Description
<input type="checkbox"/> STATE OFFICE ADMINISTRATOR	State Office Asset Management

Eprocurement, Strategic Sourcing, and Supplier Contract Management – Intro & General Profiles

Eprocurement, Strategic sourcing, and supplier contract management are combined into one module. The general profiles include:

- **AGENCY PROGRAM CONTRACT COLLABORATOR**, which allows you to collaborate with other users on the document management page.
- **HHSC Legal**, which allows you to approve SCM legal documents.
- **REQ ENTRY/REQUESTOR**, which allows you to create requisitions and order items for others. Selecting this profile will require you to specify who you want to request a requisition on behalf of. In the field, *I want the ability to enter requisitions on behalf of*, your Employee ID number is there by default. DO NOT DELETE IT. Instead, add a comma, then enter the 11- digit **Employee ID number** of the staff member that you would like to request on behalf of. (Entering their name (and not their Employee ID) may cause your request to be rejected.) You also need to enter the 3-digit code for entry origin, and the 11-digit codes for the shipping, delivery, and billing locations. If you do not know the correct codes, then consult with your supervisor before submitting the request.



Eprocurement, Strategic Sourcing, and Supplier Contract Management – REQ Approver Profiles

- **IT Specialist Approver*** allows to you to review, approve, and deny IT requisitions. Selecting this profile requires you to enter at least one origin code for an IT approver.
- **Req Amount Approver*** gives you the ability to approve requisitions within a specific dollar threshold for financial and operational services. Selecting this option requires you to enter at least one origin code.
- Selecting **Req Asset Reviewer** will enable you to review and verify asset information on Purchase Orders for accuracy, accounts, business units, and profile IDs.
- **Req Chartfield Approver*** provides you the ability to approve or deny requisitions, approve Purchaser Orders, as well as perform budget checks, and correct errors in chartfields. Chartfield Approvers are mapped by Business Unit.
- Select **REQ Program Budget Approver*** to review budget information, and review and approve or deny requisitions. Selecting this option requires that you enter at least one origin code for a budget/ QA approver.
- If you are a manager and require the ability to review, approve, or deny requisitions created by your staff, select the **REQ Supervisor Approver profile**.



Profiles with * also require you to complete and submit Form PCS 300. [Click here](#) to download the form.

Profiles	Desc
<input type="checkbox"/> IT SPECIALIST APPROVER	Review
<input type="checkbox"/> REQ AMOUNT APPROVER	Approv financi
<input type="checkbox"/> REQ ASSET REVIEWER	Review profile
<input type="checkbox"/> REQ CHARTFIELD APPROVER	Approv correct
<input type="checkbox"/> REQ PROGRAM BUDGET APPROVER	Review deny re
<input type="checkbox"/> REQ SUPERVISOR APPROVER	Review staff.

Eprocurement, Strategic Sourcing, and Supplier Contract Management – PCS Only Profiles

- **PCS Contract Administration** provides access to the document management page, the ability to request documents, and add or update contracts.
- **PCS File Room** provides access to the document management page, and the ability to view RFX docs.
- **PCS Form Approver** provides the ability to review, approve, or deny requisitions, and view header comments and attachments. Selecting this option requires you to enter origin codes for different department approvers.
- **PCS Level 1** provides you high-level access to update requisitions, contracts, and payment orders.
- **PCS Purchaser QA** allows access the document management page and review the document modification summary.
- Select **PCS Purchaser/Buyer** if your job requires you to create, approve, close, or reconcile purchase orders, or create contract documents. Selecting this option requires you to select a specific purchaser or buyer role.
- **PCS REQ BID ROOM** allows you to create and maintain bidders, update event invitations, or create bidder responses.
- Select **PCS RIT** to update approved requisitions without restarting the workflow.

Profiles	Description
<input type="checkbox"/> PCS CONTRACT ADMINISTRATION	Access docu add/update c
<input type="checkbox"/> PCS FILE ROOM	Access to do docs.
<input type="checkbox"/> PCS FORM APPROVER	Review/appr comments ar
<input type="checkbox"/> PCS LEVEL 1	Restricted fo update reqs,
<input type="checkbox"/> PCS PURCHASER QA	Access to do modification
<input type="checkbox"/> PCS PURCHASER/BUYER	Buyers creat create contra
<input type="checkbox"/> PCS REQ BID ROOM	Create and n create bidder
<input type="checkbox"/> PCS RIT	Update appr workflow (AV

Eprocurement, Strategic Sourcing, and Supplier Contract Management – RFx Bid Profiles

The following profiles provide various access to the new supplier portal, which will go live in September 2019.

- **CQC Financial Analyst** allows you to upload criteria and sub criteria information, as well as view scores and score history.
- **Evaluator** provides access for evaluating the scoring page.
- **Solicitation Approver** allows you to manually setup a procurement contract that can then be used to track spending in accordance with legal requirements.
- **Template Library Manager** is a CQC team-specific profile that allows access to manage and maintain templates for different request methods.

Profiles	Description
<input type="checkbox"/> CQC FINANCIAL ANALYST	Uploads criteria and score history.
<input type="checkbox"/> EVALUATOR	Access for evaluator s
<input type="checkbox"/> SOLICITATION APPROVER	Provides access to ap
<input type="checkbox"/> TEMPLATE LIBRARY MANAGER	Provides access for C templates for different

Eprocurement, Strategic Sourcing, and Supplier Contract Management – Restricted Rules

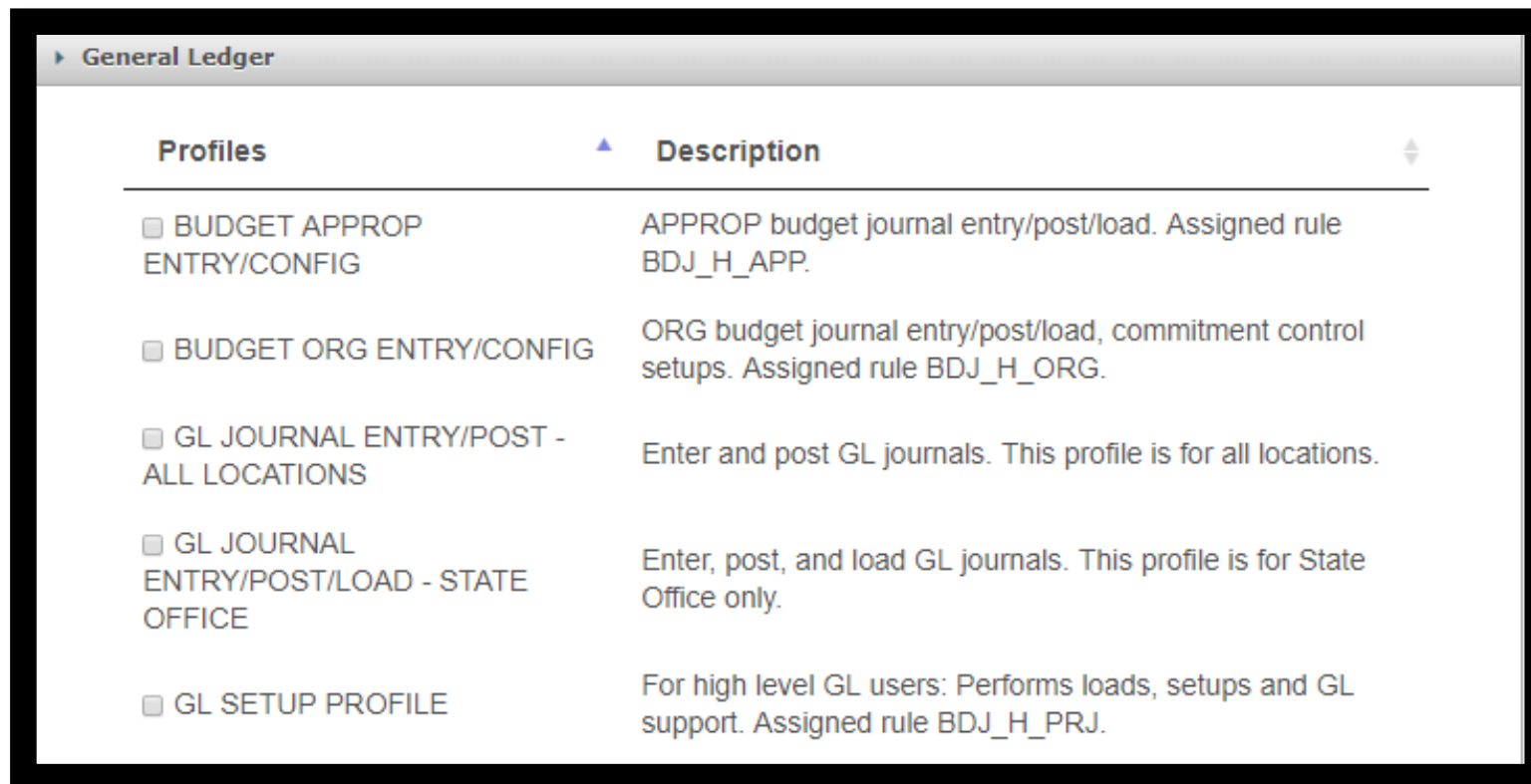
Restricted rules require a justification if selected.

- **BUDG_DT_RQ** is for overriding a budget date.
- **OVRD_RQ** is for overriding a budget for requisitions.

Profiles	Description
<input type="checkbox"/> BUDG_DT_RQ	Commitment control rule for budget date override, REQ BUDGET DATE OVERRIDE.
<input type="checkbox"/> OVRD_RQ	Commitment control rule for budget override, REQ BUDGET OVERRIDE PREFERENCE.

General Ledger – Intro

Profiles under the general ledger module manage the financial accounting information within CAPPs. This includes journal entries that are loaded from other CAPPs modules, as well as entries manually entered or uploaded directly into the general ledger. Access options vary depending on your agency.



The screenshot shows a web application window titled "General Ledger". Inside, there is a table with two columns: "Profiles" and "Description". The table lists five profiles, each with a checkbox in the "Profiles" column. The descriptions provide details about the function of each profile and the rule assigned to it.

Profiles	Description
<input type="checkbox"/> BUDGET APPROP ENTRY/CONFIG	APPROP budget journal entry/post/load. Assigned rule BDJ_H_APP.
<input type="checkbox"/> BUDGET ORG ENTRY/CONFIG	ORG budget journal entry/post/load, commitment control setups. Assigned rule BDJ_H_ORG.
<input type="checkbox"/> GL JOURNAL ENTRY/POST - ALL LOCATIONS	Enter and post GL journals. This profile is for all locations.
<input type="checkbox"/> GL JOURNAL ENTRY/POST/LOAD - STATE OFFICE	Enter, post, and load GL journals. This profile is for State Office only.
<input type="checkbox"/> GL SETUP PROFILE	For high level GL users: Performs loads, setups and GL support. Assigned rule BDJ_H_PRJ.

Options for General Ledger vary depending on your agency. Select your agency.

HHSC

DFPS

DSHS

General Ledger – HHSC Profiles

HHSC Profiles

- Select the **BUDGET APPROP ENTRY/CONFIG** role if you require the ability to enter, post, or load an APPROP budget journal (assigned rule BDJ_H_APP).
- Select **BUDGET ORG ENTRY/CONFIG** if you need to enter, post, or load an ORG budget journal (assigned rule BDJ_H_ORG).
- Select **GL JOURNAL ENTRY/POST - ALL LOCATIONS** to enter and post GL journals in all locations.
- Select **GL JOURNAL ENTRY/POST/LOAD - STATE OFFICE** to enter, post, and load general ledger journals for the State Office only.
- Select **GL SETUP PROFILE** for high-level access to load, set up, and support general ledger at a high level.

Profiles	Description
<input type="checkbox"/> BUDGET APPROP ENTRY/CONFIG	APPROP budget journal BDJ_H_APP.
<input type="checkbox"/> BUDGET ORG ENTRY/CONFIG	ORG budget journal entry setups. Assigned rule B
<input type="checkbox"/> GL JOURNAL ENTRY/POST - ALL LOCATIONS	Enter and post GL journals
<input type="checkbox"/> GL JOURNAL ENTRY/POST/LOAD - STATE OFFICE	Enter, post, and load GL Office only.
<input type="checkbox"/> GL SETUP PROFILE	For high level GL users: support. Assigned rule B

General Ledger – HHSC Manual Roles & Restricted Section

Manual Roles

- **A_GL_CASH_MGMT** allows you access to cash management.
- **A_GL_COMMITMENT_CTRL_SETUP** allows you to set up and maintain commitment control parameters, such as budgets and rules.
- **A_GL_JRNL_OVERRIDE** provides you the ability to override journal budget exceptions.
- The **A_GL_LEDGER_CLOSE** role grants the ability to close Ledgers.
- **A_GL_RECON** provides the ability to reconcile HHSAS to USAS.

Restricted Roles

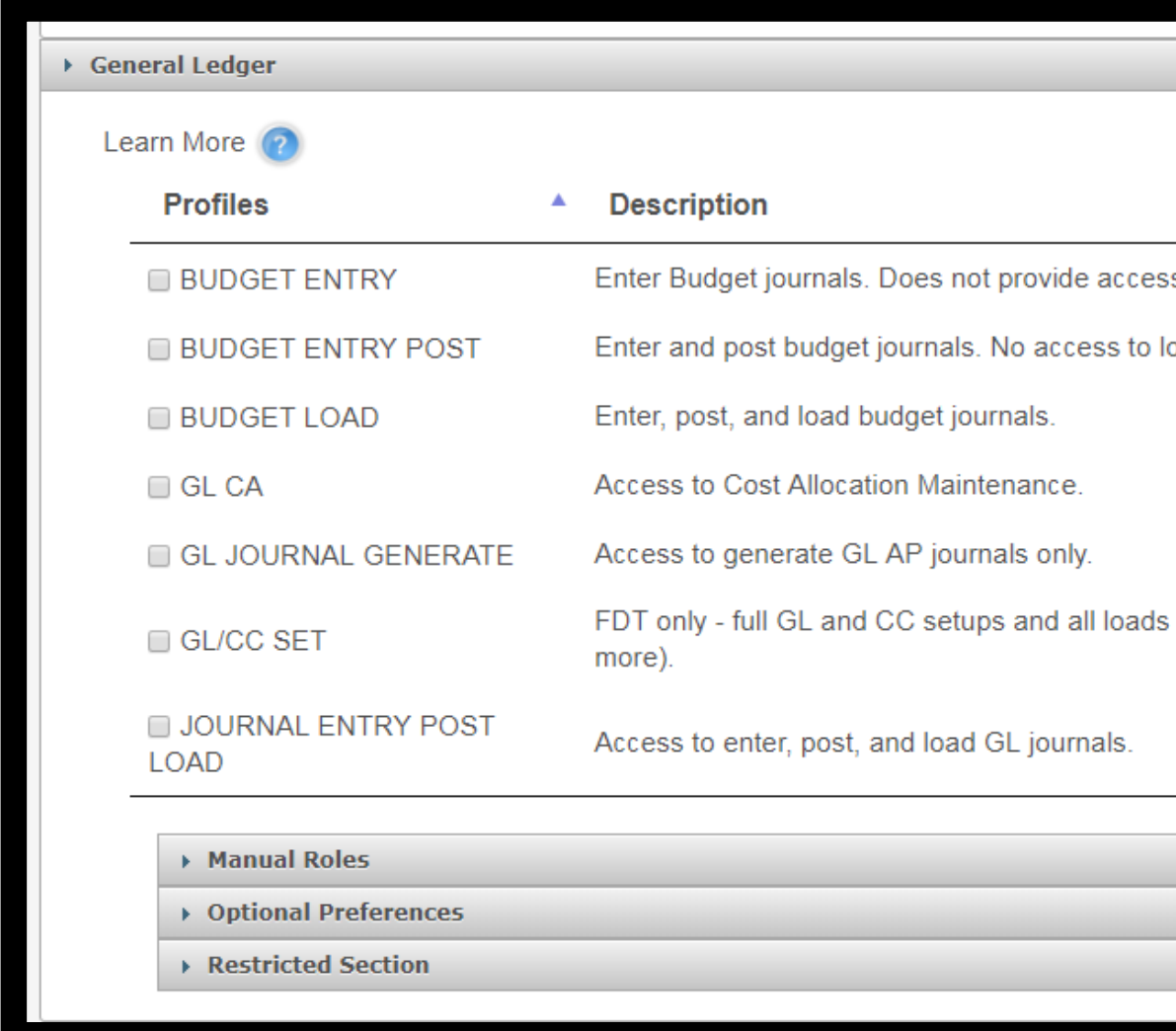
All roles require a justification if selected.

- The **A_GL_CC_RULE_EDIT** role allows editing of the Commitment Control Rules.
- **A_GL_JRNL_GENERATE** access allows you to generate journals.
- **A_GL_JRNL_UNPOST** allows you to mark journals for unposting.
- The **A_GL_SETUP_CC_RULE** role gives you the ability to set up Commitment Control Rules for use in GL and Budget.

Manual Roles	
Roles	Des
<input type="checkbox"/> A_GL_CASH_MGMT	Mana
<input type="checkbox"/> A_GL_COMMITMENT_CTRL_SETUP	Set up
<input type="checkbox"/> A_GL_JRNL_OVERRIDE	Overr
<input type="checkbox"/> A_GL_LEDGER_CLOSE	Close
<input type="checkbox"/> A_GL_RECON	Recon
Restricted Section	
Roles	Description
<input type="checkbox"/> A_GL_CC_RULE_EDIT	Edit Commitment Control R
<input type="checkbox"/> A_GL_JRNL_GENERATE	Generate Journals.
<input type="checkbox"/> A_GL_JRNL_UNPOST	Unpost Journals.
<input type="checkbox"/> A_GL_SETUP_CC_RULE	Setup Commitment Control

General Ledger – DFPS Profiles

- Select **Budget Entry** to enter Budget journals (Does not provide access to Post).
- Select **Budget Entry Post** to enter and post budget journals (No access to load Budget Journals).
- Select **Budget Load** to enter, post, and load budget journals.
- Select **GL CA** to have to access to Cost Allocation Maintenance.
- Select **GL Journal Generate** to generate GL AP journals only.
- Select **GL/CC Set** for all access to full GL and CC setups and all loads (chartfields, funding source, and more). (Used by Financials Team)
- Select **Journal Entry Post Load** for the ability to enter, post, and load GL journals.



General Ledger	
Learn More ?	
Profiles	Description
<input type="checkbox"/> BUDGET ENTRY	Enter Budget journals. Does not provide access to Post.
<input type="checkbox"/> BUDGET ENTRY POST	Enter and post budget journals. No access to load Budget Journals.
<input type="checkbox"/> BUDGET LOAD	Enter, post, and load budget journals.
<input type="checkbox"/> GL CA	Access to Cost Allocation Maintenance.
<input type="checkbox"/> GL JOURNAL GENERATE	Access to generate GL AP journals only.
<input type="checkbox"/> GL/CC SET	FDT only - full GL and CC setups and all loads (chartfields, funding source, and more).
<input type="checkbox"/> JOURNAL ENTRY POST LOAD	Access to enter, post, and load GL journals.
Manual Roles	
Optional Preferences	
Restricted Section	

General Ledger – DFPS Manual Roles & Restricted Section

Manual Roles

- **A_GL_CASH_MGMT** allows you access to cash management.
- **A_GL_RECON** provides the ability to reconcile HHSAS to USAS.

Optional Preferences

Select **BUDG_DT_GL** for the capability to override Budget Dates.

Restricted Roles

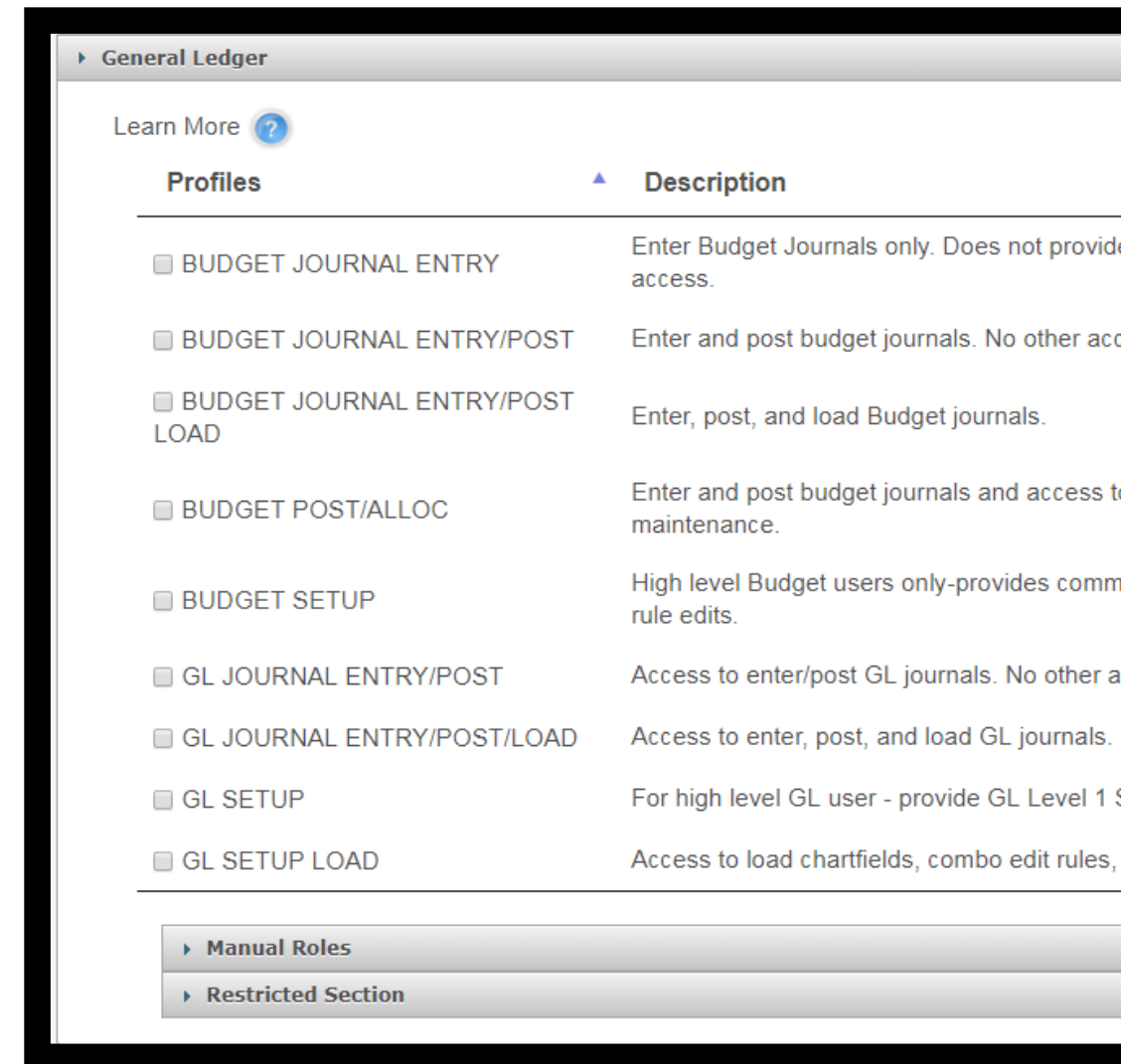
All restricted roles require a justification if selected.

- **A_GL_JRNL_OVERRIDE** allows you to override journal processes.
- **A_GL_JRNL_UNPOST** allows you to mark journals for unposting.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_GL_CASH_MGMT	Manage Cash.
<input type="checkbox"/> A_GL_RECON	Reconcile HHSAS to USAS
Optional Preferences	
Preferences	Description
<input type="checkbox"/> BUDG_DT_GL	GL Budget Date Override.
Restricted Section	
Roles	Description
<input type="checkbox"/> A_GL_JRNL_OVERRIDE	Journal Override pro
<input type="checkbox"/> A_GL_JRNL_UNPOST	Journal Unpost.

General Ledger – DSHS Profiles

- Select **Budget Journal Entry** for access to view Budget Journals only. Does not provide Budget Journal Post access.
- Select **Budget Journal Entry/Post** to enter and post budget journals. No other access is provided.
- Select **Budget Journal Entry/Post/Load** to enter, post, and load Budget journals.
- Select **Budget Post/Alloc** to enter and post budget journals and gain access to cost allocation maintenance.
- Select **Budget Setup** to have access to commitment control setup and CC rule edits. (High level Budget users only)
- Select **GL Journal Entry/Post** to enter/post GL journals. No other access is provided.
- Select **GL Journal Entry/Post/Load** to enter, post, and load GL journals. No other access is provided.
- Select **GL Setup** for high-level access, providing access to GL Level 1 Support and GL setups.
- Select **GL Setup Load** to access to load chartfields, combo edit rules, and funding sources.



The screenshot shows a web application window titled "General Ledger". Below the title is a "Learn More" link with a question mark icon. The main content is a table with two columns: "Profiles" and "Description". The table lists various system profiles with checkboxes in the "Profiles" column and their corresponding descriptions in the "Description" column. At the bottom of the table, there are two expandable sections: "Manual Roles" and "Restricted Section".

Profiles	Description
<input type="checkbox"/> BUDGET JOURNAL ENTRY	Enter Budget Journals only. Does not provide Budget Journal Post access.
<input type="checkbox"/> BUDGET JOURNAL ENTRY/POST	Enter and post budget journals. No other access is provided.
<input type="checkbox"/> BUDGET JOURNAL ENTRY/POST/LOAD	Enter, post, and load Budget journals.
<input type="checkbox"/> BUDGET POST/ALLOC	Enter and post budget journals and access to cost allocation maintenance.
<input type="checkbox"/> BUDGET SETUP	High level Budget users only-provides commitment control setup and CC rule edits.
<input type="checkbox"/> GL JOURNAL ENTRY/POST	Access to enter/post GL journals. No other access is provided.
<input type="checkbox"/> GL JOURNAL ENTRY/POST/LOAD	Access to enter, post, and load GL journals.
<input type="checkbox"/> GL SETUP	For high level GL user - provide GL Level 1 Support and GL setups.
<input type="checkbox"/> GL SETUP LOAD	Access to load chartfields, combo edit rules, and funding sources.

Manual Roles

Restricted Section

General Ledger – DSHS Manual Roles & Restricted Section

Manual Roles

- Select **A_GL_CASH_MGMT** to manage cash.
- Select **A_GL_JRNL_GENERATE** to generate Journals for Posting.
- Select **A_GL_JRNL_UNPOST** to mark Journals for unposting.
- Select **A_GL_LEDGER_CLOSE** to close Ledgers.
- Select **A_GL_RECON** to reconcile HHSAS to USAS.

Restricted Rule

Requires justification if selected.

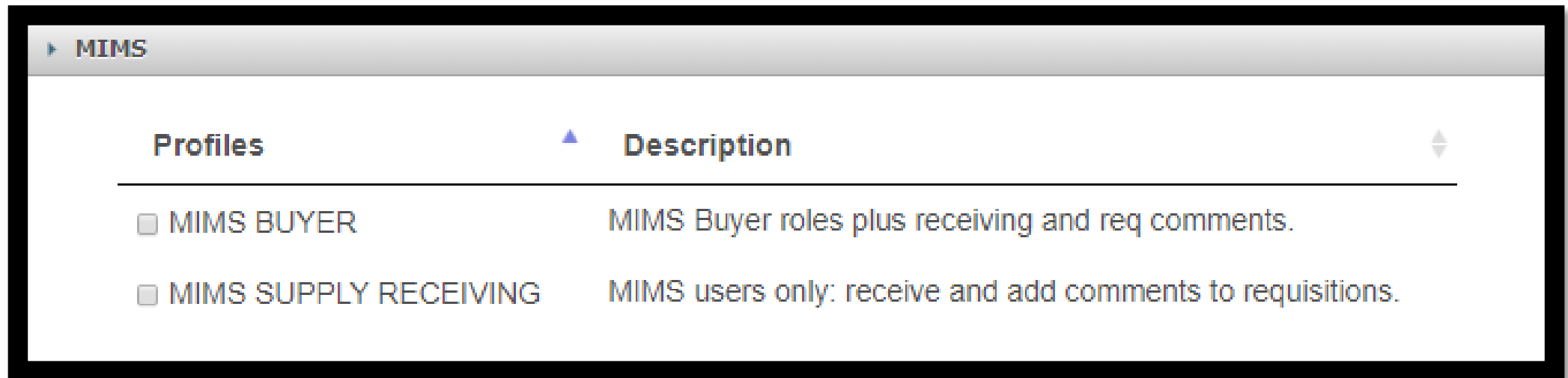
- Select **BUDG_DT_GL** for the capability to override Budget Dates.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_GL_CASH_MGMT	Manage Cash.
<input type="checkbox"/> A_GL_JRNL_GENERATE	Generate Journals for Posting.
<input type="checkbox"/> A_GL_JRNL_UNPOST	Mark Journals to Unpost.
<input type="checkbox"/> A_GL_LEDGER_CLOSE	Close Ledgers.
<input type="checkbox"/> A_GL_RECON	Reconcile HHSAS to USAS.
Restricted Section	
Roles	Description
<input type="checkbox"/> BUDG_DT_GL	Budget Date Override Access.

MIMS – Intro & Access

The module for Materials and Inventory Management System (or MIMS) contains the following profiles:

- **MIMS BUYER** gives you all the MIMS Buyer privileges, plus the ability to add and edit requisition comments. Selecting this option requires to you pick at least one buyer certification.
- **MIMS SUPPLY RECEIVING** can only be assigned to MIMS users. It allows you to receive and add comments to MIMS requisitions.

A screenshot of a software interface for MIMS. At the top, there is a header bar with a right-pointing arrow and the text 'MIMS'. Below this is a table with two columns: 'Profiles' and 'Description'. The 'Profiles' column contains two entries, each with a small square checkbox to its left. The 'Description' column contains two corresponding text descriptions. The table is enclosed in a black border.

Profiles	Description
<input type="checkbox"/> MIMS BUYER	MIMS Buyer roles plus receiving and req comments.
<input type="checkbox"/> MIMS SUPPLY RECEIVING	MIMS users only: receive and add comments to requisitions.

Purchasing – Intro & Access

The purchasing module contains roles as well as restricted profiles and roles that allow users to perform various functions of the purchasing process. Manual Roles include:

- **A_PO_ITEM_UPDATE**, which provides the ability to define items within the purchasing module.
- **A_PO_RECEIVING**, which grants the ability to receive purchasing orders.

The restricted profile, **AGENCY APPROVER WORKFLOW SETUP**, grants full access to set up requisition and purchase order approvers.

Restricted Roles

- **A_PO_RECON_CLOSE** provides the ability to reconcile/close purchase orders.
- **A_RQ_COMMENTS** allows you to add comments to requisitions.
- **A_RQ_LEVEL1_SUPPORT** allows high-level access to requisition pages and menus. This role is for users that provide requisition support at all levels as well as provide support to others.
- **A_RQ_UPDATE** allows you to update a requisition.
- **BUDG_DT_PO** allows you to override the budget date for purchasing orders.

Manual Roles	
Roles	Description
<input type="checkbox"/> A_PO_ITEM_UPDATE	Allows user to de
<input type="checkbox"/> A_PO_RECEIVING	Allows user to re
Restricted Section	
Profiles	Desc
<input checked="" type="checkbox"/> AGENCY APPROVER WORKFLOW SETUP	Full ac approv
Roles	Description
<input type="checkbox"/> A_PO_RECON_CLOSE	Allows user to close/r
<input type="checkbox"/> A_RQ_COMMENTS	Add Comments to Ap
<input type="checkbox"/> A_RQ_LEVEL1_SUPPORT	Enter comments and only.
<input type="checkbox"/> A_RQ_UPDATE	Requisition Update th
<input type="checkbox"/> BUDG_DT_PO	Commitment Control (PO_BUDGET_DATE

Reporting – Intro & Access

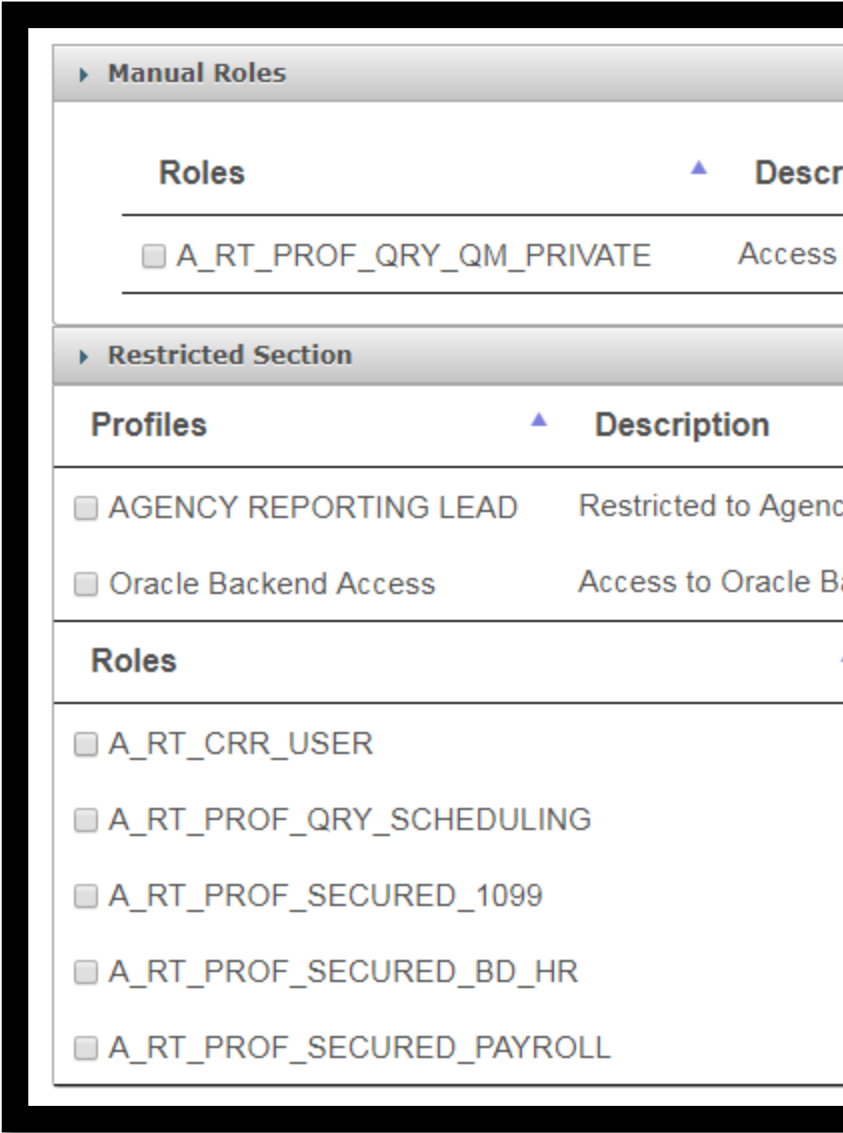
The only manual role is the **A_RT_PROF_QRY_QM_PRIVATE**, which provides you the ability to create private queries in the reporting database.

Restricted Profiles

- If you are an Agency Reporting Lead, select **AGENCY REPORTING LEAD PROFILE** to create and develop reports.
- **Oracle Backend Access** grants Oracle Backend Access for query access to Oracle through Toad or another SQL tool.

Restricted Roles

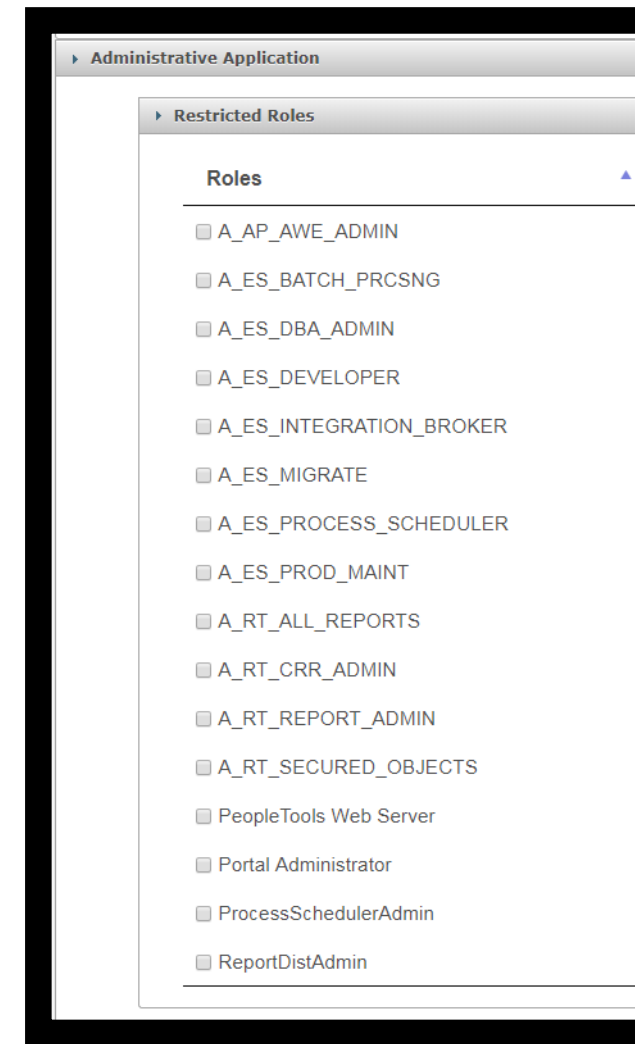
- **A_RT_CRR_USER** allows you to create reports that will be migrated for public use.
- **A_RT_PROF_QRY_SCHEDULING** provides the ability to schedule queries.
- **A_RT_PROF_SECURED_1099** provides access to Secured 1099 Queries.
- **A_RT_PROF_SECURED_BD_HR** provides query access for reviewing secured HR data.
- **A_RT_PROF_SECURED_PAYROLL** provides access to secured payroll queries.



Administration Application – Intro & Access

The Administrative Application module consists entirely of restricted roles, which require justification if selected. These roles should be assigned to Application Administrators only.

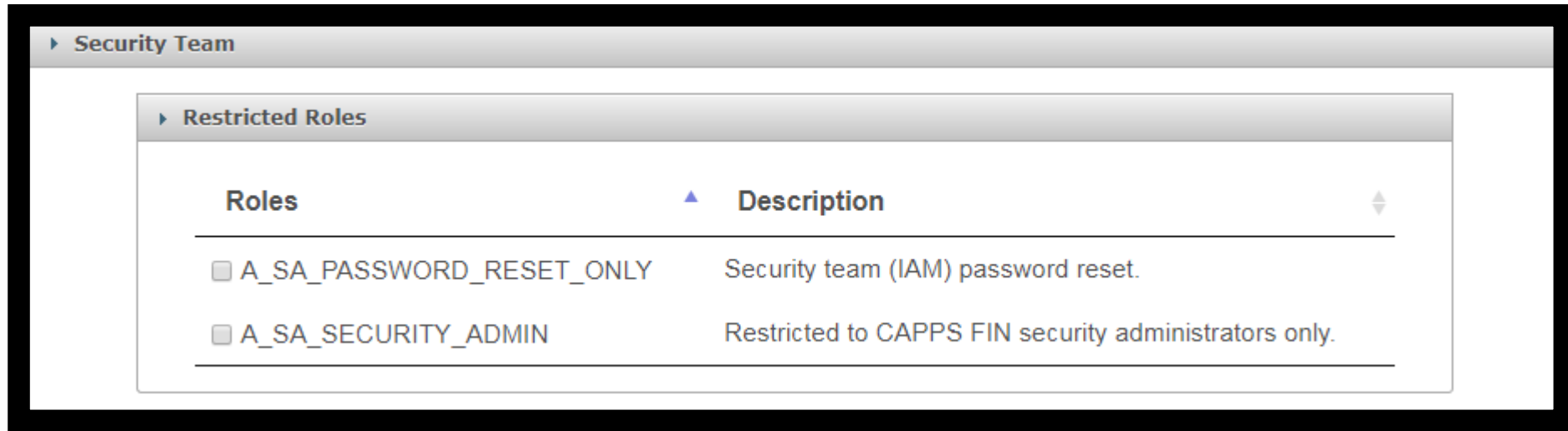
- The **A_AP_AWE_ADMIN** role grants administrative access to the AWE Workflow.
- The **A_ES_BATCH_PRCNG** role provides access for the technical team to perform batch processing.
- The **A_ES_DBA_ADMIN** role provides access for database administration.
- The **A_ES_DEVELOPER** role provides access to Developer Functions for the technical team.
- The **A_ES_INTEGRATION_BROKER** role allows access to integration broker utilities.
- The **A_ES_MIGRATE** role grants access to Migration Tools.
- **A_ES_PROCESS_SCHEDULER** is an administrative role for admin functionality within the process scheduler. For Admin Applications only.
- **A_ES_PROD_MAINT** grants access to perform functional maintenance.
- **A_RT_ALL_REPORTS** allows you access to view all reports.
- **A_RT_CRR_ADMIN** grants admin access CRR for public report and query tracking.
- **A_RT_REPORT ADMIN** grants access to the query manager, allowing creation of public queries, and the nVision and reporting console. For Admin Applications only.
- **A_RT_SECURED_OBJECTS** provides you access to secured objects.
- **PeopleTools Web Server** allows you access to the PeopleTools Web Server
- The **Portal Administrator** role allows you administer the portal and portal sites, including install options, site creation, Logon Statistics, and so forth.
- **ProcessScheduleAdmin** is an Oracle-delivered role that grants you access to view other users' view log and trace files. This is for the Admin Applications area only.
- **ReportDistAdmin** grants admin access to manage report distribution.



Security Team – Intro & Access

The Security Team module includes two roles, both which will require a justification if selected.

- Select **A_SA_PASSWORD_RESET_ONLY** to have the ability to reset user passwords.
- Select **A_SA_SECURITY_ADMIN** only if you are a CAPPS FIN Security Administrator.



The screenshot shows a web application window titled "Security Team". Inside, there is a sub-section titled "Restricted Roles". Below this, there is a table with two columns: "Roles" and "Description". The table contains two rows, each with a checkbox in the "Roles" column and a description in the "Description" column.

Roles	Description
<input type="checkbox"/> A_SA_PASSWORD_RESET_ONLY	Security team (IAM) password reset.
<input type="checkbox"/> A_SA_SECURITY_ADMIN	Restricted to CAPPS FIN security administrators only.

Change Your Agency Access – Primary Permissions

Your agency is selected by default. If you require access to a different agency in place of or in addition to your agency, scroll down to Primary Permissions and change the selection here. Be sure to select PPPCS if you require access to all agencies. You are required to enter a justification.

Primary Permissions

WARNING: Your agency is selected by default. DO NOT CHANGE this selection unless you require access to a different agency.

☐ HHSC/DSHS

☐ PPPCS (All Agencies)

☒ My Agency



Access requests to a different agency may take longer to be approved, as the request will need additional approval from that agency before it can be provisioned.

FAQS

How long does it take for my access to be approved?

Your request must have the right approvals before it can be provisioned. Time will vary depending on how many approvals you will need and the time it takes each approver to review and approve your request. If you requested access to an agency that is not your own, or to multiple agencies, your request will take longer because it will require more approvals.

Expect a request update within 10 business days. If you do not receive an update within that timeframe, your request will be cancelled and you will need to request CAPPS FIN again. You can visit the [My Orders page](#) at any time to view request updates.

How can I find the right origin codes and/or asset region/sectors for requesting access to the Asset Management module?

Consult with your supervisor before submitting the request. Entering the wrong code may result in rejection of your request.

Contact Information

For more help, visit the [HHS Enterprise Portal Web Help](#).

To resolve an issue with your request, contact the Help Desk at [512-438-4720](tel:512-438-4720).