

CANOPY TRAINING



Open your Internet browser and type in this website: <http://canopy.tamu.edu>. Bookmark it for future reference.

Logon

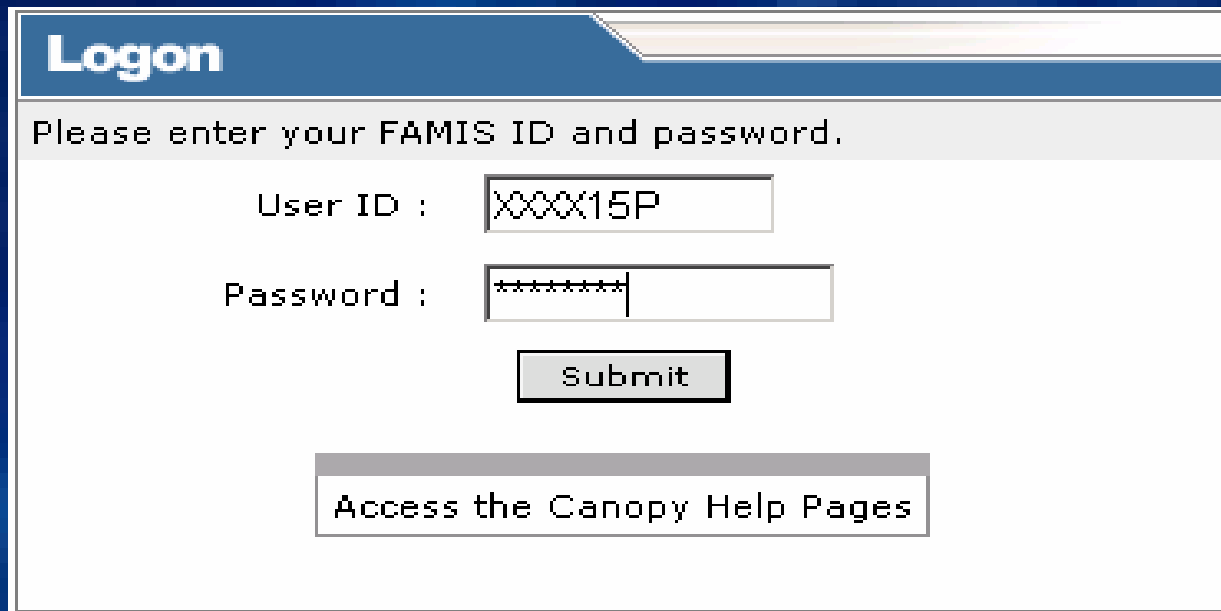
Please enter your FAMIS ID and password.

User ID :

Password :

CANOPY TRAINING

Enter your FAMIS / EPA production ID (XXXX15P) and password. Then push 'Submit' or the Enter key.



The screenshot shows a web browser window with a login form. The form has a title bar that says "Logon". Below the title bar, there is a message: "Please enter your FAMIS ID and password." The form contains two input fields: "User ID :" with the value "XXXX15P" and "Password :" with a masked password "*****". Below the password field is a "Submit" button. At the bottom of the form, there is a button labeled "Access the Canopy Help Pages".

Logon

Please enter your FAMIS ID and password.

User ID :

Password :

Changing Passwords

If you receive a message on the logon page that your password has expired, the New Password box will appear and you will need to type in a New Password (8 characters).

You will be asked to retype the New Password again to confirm.

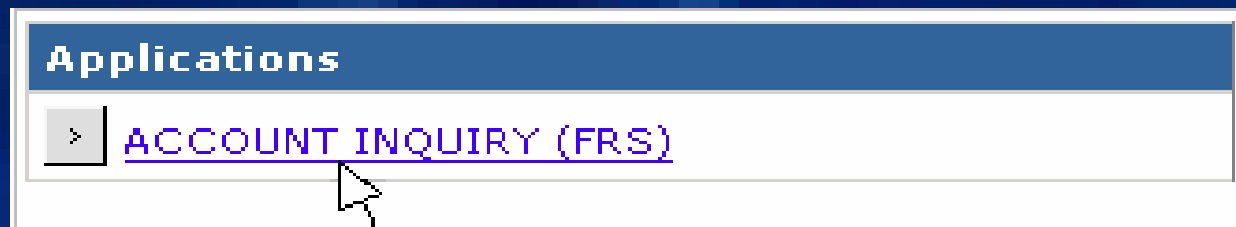
Canopy Applications

The basic applications are Account Inquiry and Document Routing and Approvals. Other applications could appear for individuals with certain security privileges (example - EPA).

Campus Codes	15 - TEXAS A&M UNIV-CORPUS CHRISTI	Select
Applications		
>	ACCOUNT INQUIRY (FRS)	
>	DOCUMENT ROUTING AND APPROVALS (ROUTING)	

Account Inquiry (FRS)

Click on the Account Inquiry (FRS) Application.



Account Inquiry

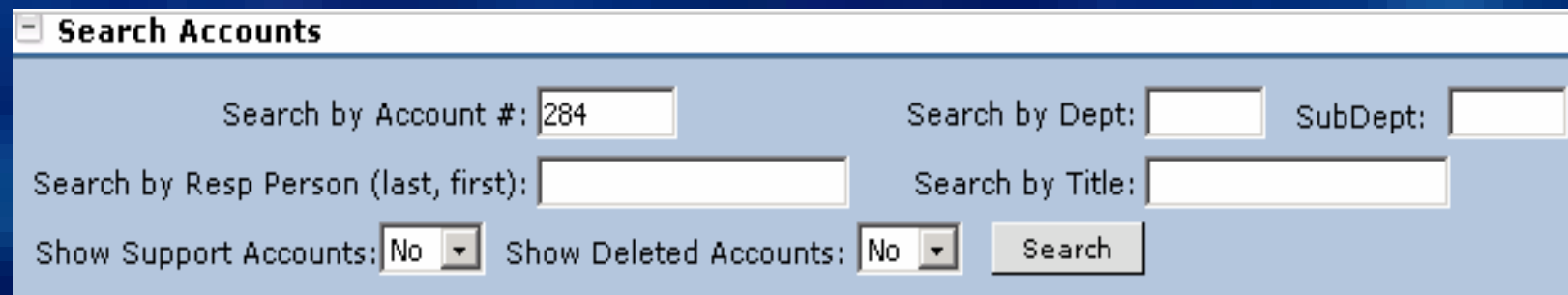
Account Inquiry allows you to look at Attributes, Balances, Transactions, Vouchers and Encumbrances (Open Commitments) of the FAMIS accounts.

Account Inquiry begins on the My Accounts tab. Click on another tab to view more information.

MyAccounts | Attributes | Summary | Open Comm | Transactions | Vouchers

Account Search

Account Search has many options to find accounts. Searches can be done with one or many fields populated. Account # can search with a partial or whole number. Dept is the FAMIS department code. The Responsible person can be the Department Head or Principle Investigator for Grants or Contracts. Title is the FAMIS title of the account.



The screenshot shows a web form titled "Search Accounts" with the following fields and controls:

- Search by Account #:
- Search by Dept:
- SubDept:
- Search by Resp Person (last, first):
- Search by Title:
- Show Support Accounts: (dropdown)
- Show Deleted Accounts: (dropdown)
- Search:

Account Search

After typing something in the search fields, push the Search button. A list of accounts will appear. You can then push the Add button to add the account to your 'My Accounts'. To see the list of added accounts, you may need to click on another tab, and then come back to the 'My Accounts' tab.

	Account	Description	Dept
Add	284XXX	EXECUTIVE	PRES
Add	284YYY	EXECUTIVE SUPPORT	PRES
Add	284ZZZ	FISCAL ACCOUNT	FISC

My Accounts

Once added, the accounts will appear with the current balance (shown as Unprotected Available). This will also show totals for Revenue, Budget, Expenses and Encumbrances (also known as Open Commitments).

My Accounts									
	Account	Description	Revenue BBA	Expense Budget	Expense Actual	Expense Encumbrance	Exclude from Bottom Line	Net BBA	Unprotected Available
Remove	284XXX	EXECUTIVE	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Remove	284YYY	EXECUTIVE SUPPORT	0.00	150,000.00	-17.00	71,293.35	0.00	78,723.65	78,723.65
* Totals Inception-to-Date									

Account Search


Above the Search fields is some filters to view balances for Fiscal year through a selected month, and one for selecting a Fiscal year. You may need to scroll to the right to click on the select button.

Thru Month:	<input type="text" value="Jun"/>	Active FY:	<input type="text" value="2006"/>	<input type="button" value="Select"/>
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Account Summary

Click on the blue Account number to go to the Summary tab and see the summary & detail of the budget, revenue & expenses.

Account
284XXX
284YYY



Account Summary

The Summary tab has a drop down box for switching between the Summary view (by Budget Pools) and the Detail view (by Object Codes). Make a selection and then push the 'Apply Changes' button.

The screenshot shows a software interface with a navigation menu at the top containing 'MyAccounts', 'Attributes', 'Summary', 'Open Comm', 'Transactions', and 'Vouchers'. Below the menu, there are several input fields and buttons: 'My Accounts:' with a 'Select...' dropdown, 'Acct:' with a text box containing '284YYY' and a 'Select' button. Further down, there are 'Thru Month:' with a 'Mo' dropdown, 'Year Type:' with an 'FY' dropdown, 'Display Info:' with a dropdown menu currently showing 'BUDGET POOL DETAIL' and an open list containing 'BUDGET POOL DETAIL' and 'BUDGET POOL SUMMARY', and an 'Apply Changes' button.

Account Detail

The Detail view will come up first. There may be multiple pages, and you will need to select a page number to see the rest of the detail. The Object codes are subtotaled by Budget Pool.

Obj	Description	C	P	Budget	CM Actual	Actual	Encumbrance	Available
1700	Wages Pool			1,238.75	0.00	0.00	0.00	1,238.75
1730	Wages - Overtime			67.50	0.00	67.50	0.00	0.00
1740	Wages - Student			2,004.75	0.00	2,004.75	0.00	0.00
****	Total Wages Pool			3,311.00	0.00	2,072.25	0.00	1,238.75

Open Commitment

The Open Commitment tab shows all pending expenses for the account selected. The Ref 1 column houses the FAMIS document number or other reference. The Description may be a business or person who will receive payment.

Obj ▲	Ref1 (PO) □	Ref4 (User) □	Date □	Description □	Original □	Liquidated □	Adjusted □	Current □
3030	EX02940	XXBSPS0	04/26/20XX	KATHY SINGER	186.00	0.00	0.00	186.00
5115	TC20XX	TC20XX	12/31/20XX	TELECOM ENCUM	178.80	92.00	0.00	157.00
5536	PX00097	XXBSAS4	09/20/20XX	DAYSRING INC	920.00	619.80	0.00	20.00
5616	AC20XX	AC20XX	10/31/20XX	ADMIN COPIERS	335.79	944.49	1,041.50	505.80

Transactions

The Transaction tab shows all the transactions for the selected account in Object code order. Displayed first will be the current month transactions. Click on the column headings to sort descending or ascending.

Select	Subcode ▲	TC □	Ref 2 □	Ref 4 □	Date □	Description □	Amount □	Batch Ref □
Select	3010	068	2606071	2606071	11/09/20XX	ENTERPRISE RENT-A-CAR	269.00	VCL029
Select	3010	060	12J0023		12/14/20XX	MOVE VO#2606071	-89.00	JE1207

Transactions

Widen the search by choosing more than one month, and push 'Apply Filter'. Narrow the list by choosing one object code. You can also export the entire list to an Excel file, by selecting the 'Export to File' button.

Months: Thru Obj Code: TC:

Found 4 Transactions.

Transactions

Click on the Select button to see more information about the transaction.

Select	3010	068	12J0023
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Detail Information			
Date:	12/09/20XX	MOVE VO#2606071 ENTERPRISE	Amount -89.00
TransCode:	060 -> 06 - Journal Entry		Dir/Ind: D
Account:	245400 00000 3010	DNR ADMIN COST	
		Tvl-In-Public Trans. - Auto Rental	
Offset:	604830-00000-3010	ENVIRONMENTAL FIELD SERVICES	
		Tvl-In-Public Trans. - Auto Rental	

Vouchers

The voucher tab displays all the vouchers (payments) that have processed on the selected account. Click on the column headings to sort descending/ascending.

Page 1 of 1					
Voucher	Lines	Dept Ref	Vendor Name	Status	Total
2606071	1	2606071	ENTERPRISE RENT-A-CAR	RECN	269.00
2605577	1	XX6K6	AMERICAN TOWER LP	RECN	412.69
2608143	1	XX6K6	AMERICAN TOWER LP	RECN	412.69
2616478	1	XX6K6	TOWER COMMUNICATIONS	RECN	2,970.00
2619251	2	XX6K6	UNDERWATER SERVICES INC	RECN	5,465.00

Vouchers

Click on the blue Voucher number to view more information about the payment.



Vouchers

The Voucher detail contains information about when and how the payment was processed, including the check number.

Browse	Header Info	Item Detail
Fiscal Year: 20XX Voucher: 2606071		
Voucher: 2606071	Vendor: 13636443730	Desc: E600333-RENTAL CAR
Alt Vend:	Due Date: 11/09/20XX	Name: ENTERPRISE RENT-A-CAR
Invoice Date: 10/01/20XX	Delivery Date:	Name:
Original Dist Date:	Customer A/R Nbr:	GSC ord:
Voucher Total: \$269.00	Contract Work Force:	Dept ref: 2606071
St Req Nbr:	Check Nbr: 336471	Check Dt: 11/10/20XX

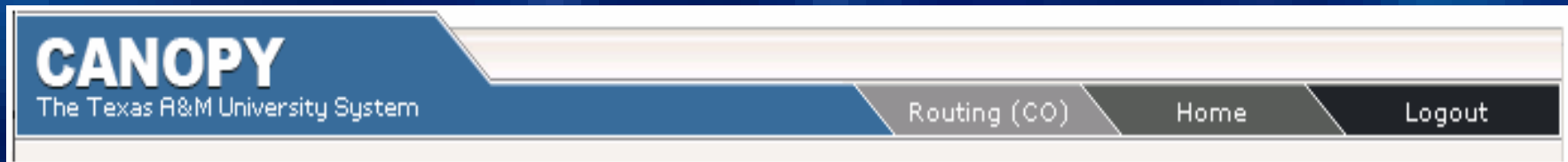
Attributes

The Account Attributes tab includes many panes of information about the account and how it is set up. Click on the + or - sign to collapse and expand the section.

Core Information										
Account Title:	EXECUTIVE SUPPORT						Freeze Flag:			
Resp Person:	PRESIDENT, CURRENT XXXXXXXX						Drop Flag:			
Resp Accountant:							Delete Flag:			
Map Code:	28YYY						SA Create Enable:	N		
SA Transactions										
	Department	Sub Department	Exec	Div	Coll	Mail Code	Statement	Budget	Actuals	
Primary:	PRES		XX	YY				Expense: N	N	
Secondary:								Revenue: N	N	
+ Financial Reporting										
+ Budget and Operations										
+ Banking and Finance										
+ Payroll										
+ Sponsored Research										
+ Other Reporting										
+ Historical										

Switch Applications

To switch applications in Canopy, click on the Home button on the Canopy Header at the top of the page.



DOCUMENT ROUTING

Click on the Document Routing and Approvals (Routing) Application.



Canopy In-box

Displayed will be your In-box. This is the same In-box as on Screen #910 in FAMIS.

<input type="checkbox"/> Details:				
Quick Actions	Doc Number <input type="checkbox"/>	Requested Action <input type="checkbox"/>	Current Status <input type="checkbox"/>	Arrival Date <input type="checkbox"/>
<input type="button" value="A"/>	PEP15EX02434	Sign	In Dept Rt	3/10/200X 11:15:00 AM
<input type="button" value="A"/>	PLP15LX02360	Sign	In Dept Rt	3/21/200X 03:52:00 PM

Canopy Sort Documents

To sort by columns, click on the dark gray column title of the column you want to sort by. Clicking once sorts in descending order. Clicking twice sorts in ascending order.

Quick Actions	Doc Number <input type="checkbox"/>	Requested Action <input type="checkbox"/>	Current Status <input type="checkbox"/>	Arrival Date <input type="triangle"/>	Notes
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Canopy View Documents

Users who create documents will have documents in their box such as:

- 1) Notifications of approved Purchasing Doc - PLP, PEP, PRQ
- 2) Notifications of approved EPA docs - EWR, EGR, EBR
- 3) PIP (Purchasing Invoice Problems)

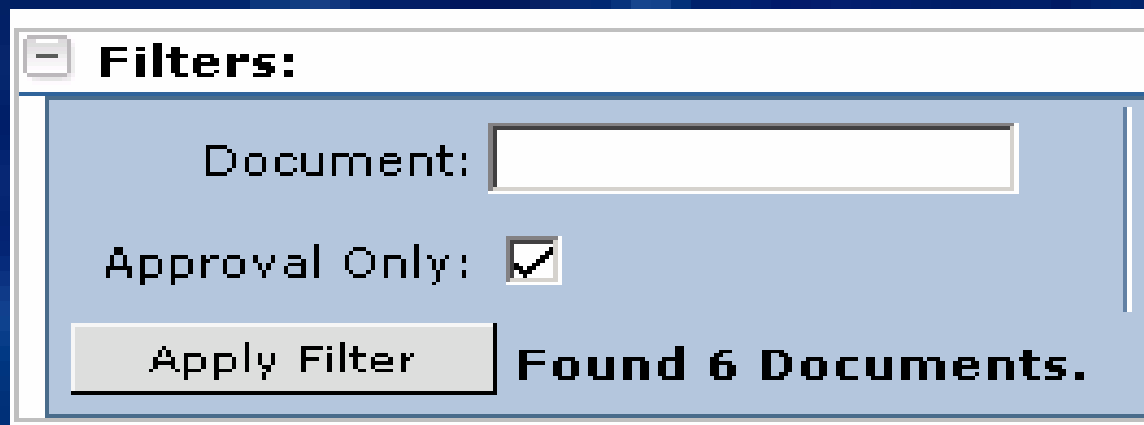
Approvers will have documents for review and approval in their box such as:

- 1) Purchasing documents for (PLP, PEP, PRQ)
- 2) EPA documents for approval (EWR, EGR, EBR)

Canopy View Documents

Click on the 'Approval Only' box to view the documents ready for approval only.

Then push the 'Apply Filter' button.



Filters:

Document:

Approval Only:

Found 6 Documents.

Canopy View Documents

If you are a Substitute for anyone else, then click on the down arrow next to 'Substitute For' to highlight the person's name from the drop down list. You will now be in their In-box.

Filters:

Document:

Approval Only:

Substitute For: My Inbox

Found 2 Documents.

Details:

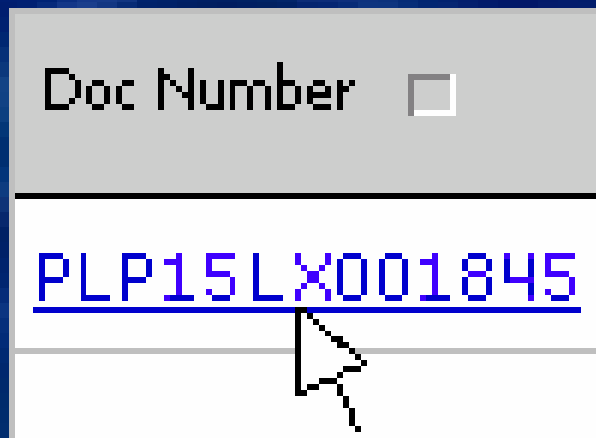
Quick Actions	Doc Number <input type="checkbox"/>	Requested Action <input type="checkbox"/>	Current Status <input type="checkbox"/>	Arrival Date <input type="checkbox"/>	
	EBR150001845	Revise	Recalled	11/8/20XX 11:00 AM	
<input type="button" value="A"/>	PEP15EX00007	Sign	In Dept Rt	2/23/20XX 10:10:00 AM	TRAVEL DANIALSORGER

My Inbox
ABDELSAMAD, MOUSTAFA H
GARCIA, CAROL S
GEYER, JANIS K
KUKLINSKI, ZAVA E
SANTROCK, KATHLEEN C
SUTTON, GAIL S
TUNNELL, JOHN W, JR
My Creator Desks

PIN: I005XX

Canopy View Documents

To view the document, click on the blue document number.



Canopy View Documents

Scroll down to view the document routing history, notes, item information, amount, accounts, etc.


Limited Purchase

Document Number: PLP15LX001845	Document FY: 20XX	Total: \$1,400.00
Category: RO	User Ref: 111111-XXX	FOB:
State Req #:	Research:	Type Funds:
Print Doc.: Y	Route Status: In Dept Rt	Type Order:
PCC Code:	LDT Code:	Cat/Order:
Summary: FIRST AID KITS AND FIRST AID TEXT BOOOK		
Arrived: 03/28/20XX at desk: APPROVER1 in office: CO-EDUCATION for action: Approve		
Dept/Sub: EDUC - COLLEGE OF EDUCATION		

Canopy View Documents

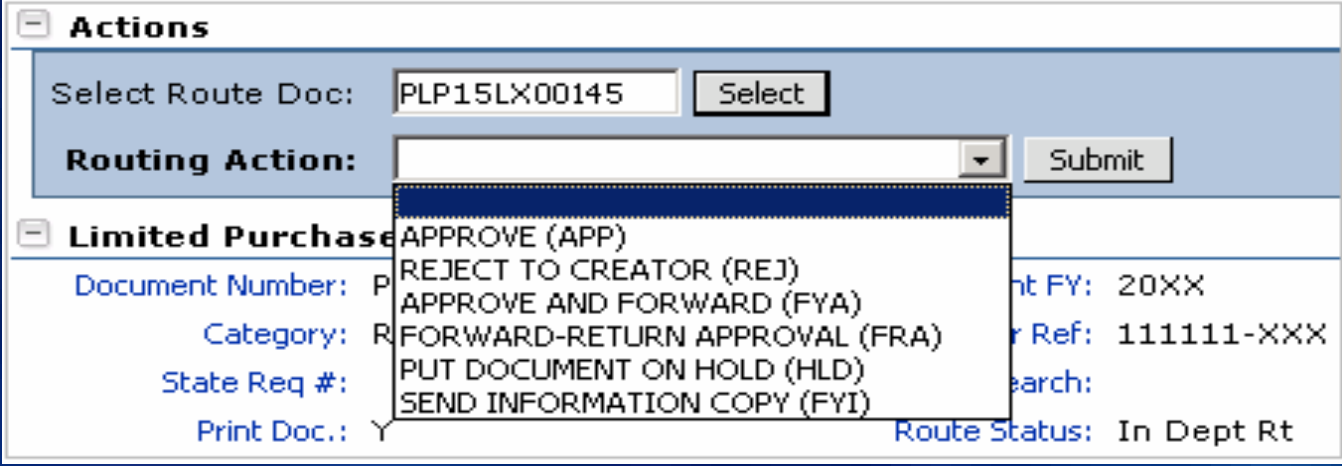
EPA Document example

Scroll down to view the Document Information, Position Information, Occupant Information, Rate Information, Funding Sources, and Routing History and Notes.

EPA Document Information			
EPA Document Number:	 0001801	Doc FY:	200X
Routing Document Number:	EBR150001801	Doc Status:	Approved
Document Type:	Occupant Change (01)	Date Created:	11/02/20XX
Action is Effective From-To:	11/20 - 08/31	Dept/Sub:	CTCS
Source Balance edits overridden?	No	Replace prior iteration(s)?	No
Override Budget	No	RF Cost Sharing?	No
		TEES Cost Sharing?	No
Justification / Comments:	hire ms. super woman to get this office in shape		
Attachments:			

Canopy Approve Documents

Select a Routing Action from the drop down list. Then push the 'Submit' button. Answer the popup boxes appropriately.



The screenshot shows a software interface window titled "Actions". At the top, there is a field "Select Route Doc:" containing the value "PLP15LX00145" and a "Select" button. Below this is a "Routing Action:" dropdown menu with a "Submit" button to its right. The dropdown menu is open, displaying a list of actions: APPROVE (APP), REJECT TO CREATOR (REJ), APPROVE AND FORWARD (FYA), FORWARD-RETURN APPROVAL (FRA), PUT DOCUMENT ON HOLD (HLD), and SEND INFORMATION COPY (FYI). Below the dropdown, there is a section titled "Limited Purchase" with several fields: "Document Number: P", "Category: R", "State Req #:", "Print Doc.: Y", "Document FY: 20XX", "Ref: 111111-XXX", and "Route Status: In Dept Rt".

Repeat steps for all the documents in your In-box.

Canopy Approve Documents

Approving the document sends it on for processing.
Rejecting sends it back for correction or deletion.

The Forwarding options are only used if the document needs other approvals outside of the normal routing.

Holding is the same as taking no action.

Approvers should not need to recall a document.

Actions

Select Route Doc:

Routing Action:

Limited Purchase

Document Number: P... Document FY: 20XX

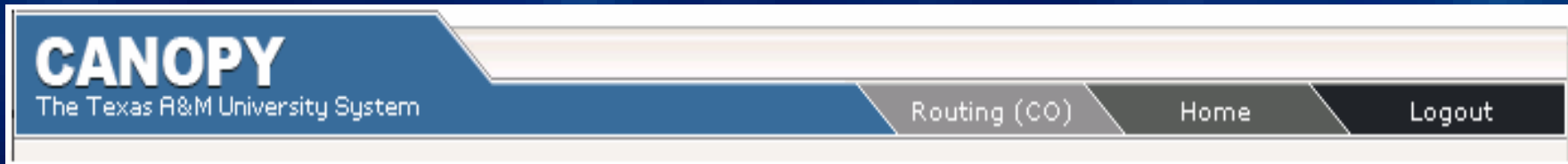
Category: R... Ref: 111111-XXX

State Req #: ... Search:

Print Doc.: Y... Route Status: In Dept Rt

- APPROVE (APP)
- REJECT TO CREATOR (REJ)
- APPROVE AND FORWARD (FYA)
- FORWARD-RETURN APPROVAL (FRA)
- PUT DOCUMENT ON HOLD (HLD)
- SEND INFORMATION COPY (FYI)

Canopy Logout



Click on the Logout button on the Canopy Header bar to logout.

Click on the Home button on the Canopy Header bar to switch to another application in Canopy.

Canopy Profile Tab

Click on the Profile Tab to select the options for how you want to receive the Email Notifications.

InBox | OutBox | Document | **Profile**

Routing Notification Profile for Signer, Bob

Notify Me by Email for:

The Following Routing Actions:

Approvals Only All (include notifications) None (No Email)

At the Following Frequency:

Every Document Daily Weekly

At the Following Email Address:

Canopy Profile Tab

Push Save when you are done.

At the Following Email Address:

bob.signer@mail.tamucc.edu

Save



Call the FAMIS helpdesk at #5767 if you have problems.

Acknowledgements

TEXAS A&M SYSTEM AND GENERAL
OFFICES

SAGO FAMIS SERVICES

SAGO BUSINESS COMPUTING SERVICES

TAMU-CC ACCOUNTING OFFICE

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