Changing Passwords

If you receive a message on the logon page that your password has expired, the Change Password box will appear and you will need to type in a New Password (exactly 8 characters, 2 of which must be numbers). You will be asked to retype the New Password again to confirm.

* NOTE – Canopy PW is same as FAMIS

Canopy Themes

Users have the option of selecting the theme. The Set Theme function is located at the bottom right of the Canopy page. Below are the choices.

Canopy Modules

The menu bar is at the top left and contains all modules – EPA, FFX, FRS, Routing. ‘System’ houses general information about Canopy. Access to each module is based on the users security access.
Canopy Modules

The Canopy Modules on the menu bar have menu options. The options are additional screens in the module.

Canopy Modules

Access to Modules is based on the Security setting for each user. Attempting to use a Module you are not permitted to will generate an error message.

Canopy Modules

This Training will not cover the EPA or FFX Modules. EPA Training is handled by Payroll. The FFX Module has very few users.

Canopy Menu

On the Right side of the Menu is the filter to select a Fiscal Year. There is also the Feedback link. The Feedback goes to the Canopy Programmers at TAMU System Offices.

System Menu

The System menu houses the User Profile. Users may update this as needed.

System Menu

The System menu also has the Release Notes. This contains history on updates to the Canopy program since inception.
FRS SEARCH MENU

The FRS (FAMIS) Search is the default module beginning screen. To choose another module, just click on the menu bar, or select a Submenu from the tabs.

SUBMENU TABS

Each Submenu item can be located by using the menus at the top or by clicking on the page tabs. The FRS Search Submenu items are shown below.

Purchasing Documents Submenu

The Purchasing Document Submenu on the FRS module contains a menu for looking at all Purchasing Docs (E's, L's, R's & P's). The submenu items also appear on the tabs.

Invoices Submenu

The Invoices Submenu on the FRS module contains a menu for looking at Invoices posted against Purchasing documents. The Invoices are from the Vendors. The submenu items also appear on the tabs.

Receiving Submenu

The Receiving Submenu on the FRS module contains a menu for looking at Receiving on all Purchasing documents. The submenu items also appear on the tabs.

Vendor Submenu

The Vendor Submenu on the FRS module contains a menu for looking at Documents, Invoices & Vouchers by Vendor. The submenu items also appear on the tabs.
Voucher Submenu

The Voucher option on the FRS module contains a menu for looking at the Vouchers. The submenu items also appear on the tabs.

FRS ACCOUNT SEARCH

The FRS Account Search allows the user to locate accounts by 1 or more field. Enter a result and push the 'Search' button.

Account - My Accounts

Select the Show Support Accounts to see all support accounts. Push the 'Search' button to see the list of accounts. Add accounts to your favorites by clicking on the red 'Add' on the right side.

Account Summary

The Account Summary defaults to the Detail display. The Detail will display transactions subtotaled by object code in Budget Pool categories. This is similar to screen 019 in FAMIS.

Account - My Accounts

To find out more information, click on the blue account number. This will take you to the Account Summary by object code, like screens 019 & 069 in FAMIS.

Account Summary

Click on the SL display dropdown menu to see the totals by Budget pools like screen 034 in FAMIS.
Account Summary

The Summary shows the totals by Budget Pool. This is the same as Screen 034 in FAMIS. The Available column shows the current balance in the Budget Pools.

Open Commitment

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

Transactions

The Transaction option from the FRS module shows all the transactions for the selected account in Object code order. Click on the column headings to sort descending or ascending.

FRS Reports

The Report option allows users to download a statement for an account. The Reports can be either PDF or Excel. Select a month and push one of the Download buttons.

FRS Reports

Below is a sample PDF Report.

Purchasing Doc Search

The Purchasing Document Search allows the user to locate documents by 1 or more field. Choose the appropriate class and enter a result and push the 'Submit' button.
Purchasing Doc Search

The Purchasing Document Search results display as a list based on the search fields that the user populated. Clicking on the blue Document number will take you to the Purchasing Document Header.

Purchasing Doc Header

The Purchasing Document Header shows the vendor, date created and status of the document. Clicking on the blue Line Item number will take you to the Line Item display.

Invoice Search

Enter a Document number, pushing the "Submit" button to see the list of Invoices for that Purchasing Document. Click on the blue Document number to go back to the Purchasing Document Header. Click on the Invoice to go to the Invoice Header.

Invoice Search

Click on the green PIP paper icon to go to the PIP — Purchasing Invoice Problem document. PIP’s are used by Accounts Payable to let the department know when there is a problem with a particular payment for a Purchasing Document.
PIP – Purchasing Invoice Problem

PIP's are from Accounts Payable to the department to show there is a discrepancy between the Purchasing document and the Vendor's Invoice. Read the 'Comments' from AP and take action on the document.

Invoice Header

The Invoice Header shows the vendor, receiving date and matching status to the Purchasing document.

Vouchers

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

Voucher Header

The Voucher Header contains information about when and how the payment was processed, including the check number.
Voucher Header
The Voucher Header also shows the Voucher Line Items, including the Purchasing document number.

Click on the blue Account number to go to the Account Summary.

Voucher Line Item
The Voucher Line Item shows details about each line item.

Clicking on the blue Account number takes you to the Account Summary. Clicking on the Vendor Tab takes you to the Vendor Information.

Canopy In-box
The Routing Module contains the user's In-box. Displayed will be your In-box. This is the same In-box as on Screen #910 in FAMIS.

Canopy In-Box Filters
To sort columns, click on column title. Clicking once sorts in descending order. Clicking twice sorts in ascending order.

Click on the Approve Only Yes circle will only show documents that need approvals.

Canopy 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) Notifications of approved DBR documents
4) PIP (Purchasing Invoice Problems)

Canopy Documents
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)
3) DBR documents for approval
Substitutes
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.

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.

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.

Approve Documents
1) Approving the document sends it on for processing.
2) Rejecting sends it back for correction or deletion.
3) The Forwarding options are only used if the document needs other approvals outside of the normal routing.
4) Holding is the same as taking no action.
5) Approvers should not need to recall a document.

Approve Documents
Select a Routing Action from the drop down list. Then push the ‘Submit’ button. Answer the popup boxes appropriately.

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

Click on the Profile Tab to select the options for how you want to receive the Email Notifications from Canopy. The Email Notices let the user know when documents arrive in their In-box.

Routing Profile Tab

Push Save when you are done.

Call the FAMIS helpdesk at #3614 if you have problems.

Canopy Logout

Click on Logout located at the top right to logout.

Acknowledgements

TEXAS A&M SYSTEM AND GENERAL OFFICES

SAGO FAMIS SERVICES

SAGO BUSINESS COMPUTING SERVICES

TAMU-CC ACCOUNTING OFFICE

WWW.BACKGROUNDSARCHIVE.COM
FAMIS Training Survey

Accounting services is comprised of the accounting, accounts payable and travel departments. We will strive to support university programs, services, and research with accurate and timely financial services in a courteous and efficient manner.

This survey will serve to provide us with feedback concerning training that we offer the University Staff. We wish to meet the professional needs of the University Staff, so your participation in this survey will help us to evaluate the training we offer. The name and description of the training you have completed is listed below.

CANOPY

1. The training was ____________ beneficial to my job duties:
   - [ ] Not
   - [ ] Somewhat
   - [x] Very

2. The content, handouts and manuals covered by the training are ________________.
   - [ ] Confusing
   - [x] Just Right
   - [ ] Too Simple
   - [ ] Other: Please explain in the Comments on #6.

3. The length of time it took to complete the training was ________________.
   - [ ] Too Long
   - [x] Just Right
   - [ ] Too Short

4. How did the facilitators of this training do with presenting the material?
   - [ ] Confusing
   - [x] Just Right
   - [ ] Too Simple
   - [ ] Other: Please explain in the Comments on #6.

5. My overall perception of this training was ________________.
   - [ ] Poor
   - [ ] Fair
   - [ ] Good
   - [x] Excellent

6. My Comments on this training are:
   - Excellent + precise presentation. Manual would be perfect.

Please fold this survey and return by campus mail to:
   - Shelley Knight
   - Lisa Garza
   - Unit # 5737
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