TRAINING OBJECTIVES

By the end of this session, you will know how to:

– Access Canopy
– Log into Canopy
– Create a New Budget Position
– Review and approve an EBR
CANOPY ACCESS

• HOW TO ACCESS CANOPY
  – Approved Account Profile
    • http://www.pvamu.edu/pages/2279.asp
  – Canopy Internet Address
    • Production: https://sago-apps.tamu.edu/canopy/logon.aspx?c=1
    • Training: https://lab1.system.tamu.edu/Training/canopytwo/logon.aspx
CANOPY LOG-IN

• HOW TO LOG-IN

@ Canopy Login Homepage - The Texas A&M University System:
  • Enter your FAMIS User Id
  • Enter your Password
  • Click “Login”

• The Creator Selects:
  – EPA - Personnel Action Module
  – Create New Doc
EPA Personnel Action Module
Main Menu – EPA – Create Document

• Select Create Type:
  – New Budgeted Position

• Enter Workstation:
  – “P”

• Select Document Type:
  – Create or Re-activate Position

• Select Recommended Occupant Action:
  – New Hire
  – Re-appoint
Main Menu – EPA – Create Document

- Select Current Occupant Action:
  - (This action is auto filled for this Create Type)
- Select Position Action:
  - Create Position
- Click:
  - Create Document
Steps required to update/complate an EPA document (your current step is highlighted):

1. Edit the header information and save any changes.
2. Edit the individual source lines and save changes for each line.
3. Validate the document (this will also generate the net funding).
4. Review the net funding and make any necessary changes to the account information.
5. Close the document and route it for approval.

EPA Document Information

EPA Document Number: 2007206
Routing Document Number: Doc FY: 2009
Document Type: Create or Reactivate Position (02) Date Created: 11/05/2008 8:47 PM
Action is Effective From-To: Last Updated: 11/05/2008 8:47 PM
Dep/SubDep: Source Balance: Override Budget: Replace Prior Iteration(s): TEES Cost Sharing:
Edit Overridden: RF Cost Sharing:
Justification/Comments:

Attachments:

Add new attachment:
Name: (select one or type in your own)
File location: Browse...
Add Attachment
**EPA ON SCREEN HELP**

**Steps required to update/completed an EPA document (your current step is highlighted)**

1. Edit the EPA document.
   1.1 Edit the header information and save any changes.
   1.2 Edit the individual source lines and save changes for each line.

2. Validate the document.

3. Review Net Funding

4. Close the document and route it for approval.
1.1 - EDIT HEADER INFORMATION

- Header Information Sections must be updated before clicking “Save”:
  - EPA Document Information
  - Position Information
  - Occupant Information
  - Rate Information
EPA Document Information

• Action is Effective From/To: (Date Field)
  – Physical Work Dates
  – Separate EPA is required for Faculty Summer Appointment

• Source Balance Edits Overridden
  – Check if Action Effective From/To dates are not the same as Annual Term and Funding Source Lines dates
EPA Document Information

• Replace Prior Iteration
  – Only required when making changes to a current PIN for the same period.

• Justification/Comments
  – An explanation as to why the EPA is being submitted
Steps required to update/complete an EPA document (your current step is highlighted)

1. Edit the EPA document.
   1.1 Edit the header information and save any changes.
   1.2 Edit the individual source lines and save changes for each line.

2. Validate the document (this will also generate the net funding).
3. Review the net funding and make any necessary changes to the account information.
4. Close the document and route it for approval.

EPA Document Information

- EPA Document Number: 0007207
- Doc FY: 2009
- Routing Document Number:
- Document Type: Create or Reactivate Position (02)
- Date Created: 11/06/2008 7:15 AM
- Last Updated: 11/06/2008 7:15 AM
- Action is Effective From-To: 11/15/2008 - 5/31/2009
- Dep/SubDep: [Select]
- Source Balance: [Select]
- Override Budget: [Select]
- RF Cost Sharing: [Select]
- TEES Cost Sharing: [Select]
- Replace Prior Iteration(s): [Select]
- Justification/Comments:

Morris Chestnut is being hired as Adjunct Professor in the Biology Department. This is a Non-Tenure appointment. Course Assignments are BIOL1049, BIOL1049, BIOL2013.

Attachments:

Add new attachment:
- Name: [Select]
- File location: [Select]
- Add Attachment
Position Information

• Administrative Location (Adloc)
  – 05XXXXXXXX

• Title Code
  • Please refer to Human Resource Web Site
    http://www.pvamu.edu/pages/2078.asp
  • Faculty Appointments refer to memo from Provost for approve title codes
Position Information

• Annual Term From/To: (Date Field)
  – Term of Position (9 or 3 months)
    • Date Rules
      – Date can only begin on the 1\textsuperscript{st} or 16\textsuperscript{th}
      – Date can only end on the 15\textsuperscript{th} or last day of the perspective month

• Annual Term Modifier
  – Select
    • Normal – No breaks in term
Position Information

- **Annual Term Months**
  - System will calculate based upon dates in the Annual Term From-To Field

- **Assignment Dist/Cty**
  - Not Required

- **Temporary PIN**
  - Not required Faculty Appointments
Occupant Information

- Social Security Number
  - Issued by Social Security Administration

- From/To Pin
  - Required if Recommended Occupant Action is “Transfer In”
  - Required if Current Occupant Action is “Transfer Out”
Occupant Information

• Occupant Name
  – Last
  – Suffix
  – First
  – MI
• Employee Location (Not Required)
• Check Distribution (Not Required)
**Position Information**

- **PIN Number:** P - New (Budget)
- **Administrative Location:** 6512115
- **Title Code:** 7230
- **Previous Title Code:** 9/1/2008
- **Annual Term From-To:** 5/31/2009
- **Position Action:** Create PIN (CR)
- **Assignment Dist/Cty:**

**Occupyant Information**

- **Occupant UIN:** 699999999
- **Occupant SSN:** 699999999
- **From/To Pin:** Chestnut
- **Occupyant Name:**
  - (first name) Morris
  - (middle initial) F
  - (suffix) (last name)

**Justification/Comments:**

Morris Chestnut is being hired as Adjunct Professor in the Biology Department. This is a Non-Tenure appointment. Course Assignments are BIOL1043, BIOL1044, BIOL2013.
Rate Information

• Percent Effort
  – Contract Appointments refer to FTE Calculation

• FTE Monthly/Hourly Rate of Pay
  – Monthly Rate of Pay for all other Budget Position

• Pay Indicator
  – “A” if Percent Effort = 100
  – “B” if Percent Effort < 100
Rate Information

- Source Control
  - Normal
  - Locked
    - Great Tool when only salary amount is known

- Pay Type
  - Normal
### Occupant Information

- **Occupant UIN:** 
- **Occupant SSN:** 699999999
- **From/To PIN:** 
- **Occupant Name:** Chestnut (last name) Monis (suffix) F (middle initial)
- **Previous Occupant SSN:** 
- **Previous Occupant Name:** Vacant (VA)
- **Recommended Occupant Action:** New Hire (NH)
- **Employee Location:**

### Rate Information

- **Percent Effort:** 25.00
- **Previous Percent Effort:** 333.00
- **FTE Monthly/Yearly Rate:**
- **Previous Monthly/Yearly Rate:**
- **Salary Action:** Blank - none

### Funding Source Lines

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7230 - Description not found</td>
<td>09/01/2008 to 08/31/2009</td>
<td>Description not found</td>
<td><strong>Account not found</strong></td>
<td><strong>Description not found</strong></td>
<td>0.00%</td>
<td>/</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Net Funding**

No records found to display.

**Document Changes in Payroll**

No records found to display.
Click Save
### EPA Document Information

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA Document Number</td>
<td>0007207 (cover sheet)</td>
</tr>
<tr>
<td>Routing Document Number</td>
<td></td>
</tr>
<tr>
<td>Action Effective From-To</td>
<td>11/15/2008 - 05/31/2009</td>
</tr>
<tr>
<td>Source Balance Edit Override</td>
<td>Yes</td>
</tr>
<tr>
<td>Document Type</td>
<td>Create or Reactivate Position (02)</td>
</tr>
<tr>
<td>Date Created</td>
<td>11/06/2008 7:15 AM</td>
</tr>
<tr>
<td>Last Updated</td>
<td>11/06/2008 7:36 AM</td>
</tr>
<tr>
<td>Status</td>
<td>Open for Editing</td>
</tr>
<tr>
<td>Doc FY</td>
<td>2009</td>
</tr>
</tbody>
</table>

### Position Information

<table>
<thead>
<tr>
<th>PIN Number</th>
<th>P - New (Budget)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Code</td>
<td>7230 ADJUNCT PROFESSOR</td>
</tr>
<tr>
<td>Advisor</td>
<td>05-11115 DEPARTMENT OF BIOLOGY</td>
</tr>
</tbody>
</table>

| Annual Term From-To         | 09/01/2008 - 05/31/2009 |
| Position Action             | Create PIN (CR)        |
| Assignment Dist/Only        | Temporary PIN: No      |

### Occupant Information

<table>
<thead>
<tr>
<th>Occupant SSN</th>
<th>999-99-9999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Occupant SSN</td>
<td></td>
</tr>
<tr>
<td>Occupant in Position From-To</td>
<td>11/15/2008 -</td>
</tr>
<tr>
<td>Recommended Occupant Action</td>
<td>New Hire (NH)</td>
</tr>
<tr>
<td>Occuapt Name</td>
<td>Chestnut Morris F</td>
</tr>
<tr>
<td>Previous Occupant Name</td>
<td></td>
</tr>
<tr>
<td>Current Occupant Action</td>
<td>Vacant (VA)</td>
</tr>
<tr>
<td>Termination Reason</td>
<td>Blank/None</td>
</tr>
</tbody>
</table>

### Rate Information

<table>
<thead>
<tr>
<th>Percent Effort</th>
<th>25.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Percent Effort</td>
<td></td>
</tr>
<tr>
<td>Cost/monthly/hourly Rate</td>
<td>$3,333.00</td>
</tr>
<tr>
<td>Previous Monthly/Hourly Rate</td>
<td>$0.00</td>
</tr>
<tr>
<td>Salary Action</td>
<td>Blank - none</td>
</tr>
<tr>
<td>Pay Indicator</td>
<td>Monthly - Less than 100% (B)</td>
</tr>
<tr>
<td>Source Control</td>
<td>Normal</td>
</tr>
<tr>
<td>Budgeted Salary</td>
<td>$7,500.00</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Normal</td>
</tr>
</tbody>
</table>

Record has been successfully modified (Message: 0003)
1.2 FUNDING SOURCE LINES

- **Click:**
  - **Edit**
    - This action will display all edit fields
  - **Replicate**
    - This action will add additional Funding Source Lines
  - **Delete**
    - This action will remove extra Funding Source Lines
    - EPA requires at least 1 Funding Source Line
1.2 FUNDING SOURCE LINES

• Effective Dates
  – Date Rules
    • Date can only begin on the 1\textsuperscript{st} or 16\textsuperscript{th}
    • Date can only end on the 15\textsuperscript{th} or the last day of the perspective month

• Campus Code
  – “05”

• Account
  – Determined by Unit
1.2 FUNDING SOURCE LINES

– Object Code
  • Determined upon the Title
  • Do not select Object Codes in the 1700 Series
1.2 FUNDING SOURCE LINES

– Acct Analysis Code

• 0130 – Account Range 110000 – 117999
• 0915 – Account Range 112000 – 112090
• 0159 – Account Range 118581 – 118587
• 0132 – Account Range 170202 – 178028
• 0766 – Account Range 180000 – 189999
1.2 FUNDING SOURCE LINES

– Acct Analysis Code (continued)

• 5410 – Account Range 200000 – 299999
• 5211 – Account Range 300000 – 399999
• 5100 – Account Range 400000 – 499999
• 5012 – Account Range 500000 – 599999
• 5160 – Cooperative Extension
• 5170 – Cooperative Ag Research Center
1.2 FUNDING SOURCE LINES

- Pgm Code
  - Only required for Campus 08 Accounts

- Percent Effort
  - Should equal Rate Information Percent Effort

- MSO/SP Flags
  - Not Required
1.2 FUNDING SOURCE LINES

• Click:
  – Save
  – Validate
  – Close
Justification/Comments: Morris Chestnut is being hired as Adjunct Professor in the Biology Department. This is a Non-Tenure appointment. Course Assignments are BIOL1043, BIOL1044, BIOL2013.

<table>
<thead>
<tr>
<th>Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIN Number: P - New (Budget)</td>
</tr>
<tr>
<td>Adloc: 05-112115 DEPARTMENT OF BIOLOGY</td>
</tr>
<tr>
<td>Title Code: 7230 ADJUNCT PROFESSOR</td>
</tr>
<tr>
<td>Previous Title Code:</td>
</tr>
<tr>
<td>Annual Term From-To: 09/01/2008 - 05/31/2009</td>
</tr>
<tr>
<td>Position Action: Create PIN (CR)</td>
</tr>
<tr>
<td>Assignment Class/Code:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Occupant Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant UIN: 899-99-9999</td>
</tr>
<tr>
<td>Previous Occupant SSN:</td>
</tr>
<tr>
<td>Occupant in Position From-To: 11/15/2008 -</td>
</tr>
<tr>
<td>Recommended Occupant Action: New Hire (NH)</td>
</tr>
<tr>
<td>Employee Location:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rate Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Effort: 25.00 %</td>
</tr>
<tr>
<td>Previous Percent Effort:</td>
</tr>
<tr>
<td>FTE Monthly/Hourly Rate: $3,333.00</td>
</tr>
<tr>
<td>Previous Monthly/Hourly Rate: $0.00</td>
</tr>
<tr>
<td>Salary Action: Blank - none</td>
</tr>
</tbody>
</table>

**Funding Source Lines**

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7230</td>
<td>05/01/2008, 05/31/2009</td>
<td>06 112115</td>
<td>0130</td>
<td>25</td>
<td></td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Net Funding**

No records found to display.

**Document Changes in Payroll**

No records found to display.
Click Save
Click VALIDATE
The document was validated and net funding was generated successfully.

### Funding Source Lines

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7230 - ADJUNCT PROFESSOR</td>
<td>09/01/2008 to 05/31/2009</td>
<td>PV - 112115-0000-0000</td>
<td>0130</td>
<td></td>
<td>25.00%</td>
<td></td>
<td>$838.29</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Net Funding

The document was validated and net funding was generated successfully.

<table>
<thead>
<tr>
<th>Line</th>
<th>Campus</th>
<th>Source Account</th>
<th>Rqmt/Sav. Account</th>
<th>Type</th>
<th>Annual Net Amount After Iter</th>
<th>Iter Eff Date Net Amt</th>
<th>Future Net Amt</th>
<th>Past/Corr Net Amt</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PV</td>
<td>112115-0000-0000-1000</td>
<td>112115-0000-0000-1000</td>
<td>Salary Benefits</td>
<td>$7,500.00</td>
<td>$4,516.13</td>
<td>$5,416.13</td>
<td>$4,516.13</td>
<td></td>
</tr>
</tbody>
</table>

### Document Changes in Payroll

No records found to display.
### Position Information
- **PIN Number:** PD3499 (Budget)
- **Location:** 05-112115 DEPARTMENT OF BIOLOGY
- **Title Code:** 7230 ADJUNCT PROFESSOR
- **Previous Title Code:**
- **Annual Term From-To:** 09/01/2008 - 05/31/2009
- **Position Action:** Create PIN (CR)
- **Assignment Dist/Unit:**
- **Base/New Iteration:** 00/01
- **Annual Term Modifier:**
- **Annual Term Months:** 9.0
- **Temporary PIN:** No

### Occupant Information
- **Occupant UNI:**
- **Occupant SSN:** 899-99-9999
- **Previous Occupant SSN:**
- **Occupant in Position From-To:** 11/15/2008 -
- **Recommended Occupant Action:** New Hire (NH)
- **Employee Location:**
- **From/To Pin:**
- **Occupant Name:** Chestnut Morris F
- **Previous Occupant Name:**
- **Current Occupant Action:** Vacant (VA)
- **Termination Reason:** Blank/None
- **Check Distribution:**

### Rate Information
- **Percent Effort:** 25.00%
- **Previous Percent Effort:**
- **FTE Monthly/Weekly Rate:** $3,333.00
- **Previous Monthly/Weekly Rate:** $0.00
- **Salary Action:** Blank - none
- **Pay Indicator:** Monthly - Less than 100% (B)
- **Source Control:** Normal
- **Budgeted Salary:** $7,500.00
- **Previous Budgeted Sal:** $0.00
- **Pay Type:** Normal

### Funding Source Lines

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7230</td>
<td>09/01/2008 to 05/31/2009</td>
<td>PV - 112115-00000</td>
<td>0130</td>
<td>0</td>
<td>25.00%</td>
<td>O/</td>
<td>$833.25</td>
</tr>
</tbody>
</table>

### Net Funding

<table>
<thead>
<tr>
<th>Line</th>
<th>Campus</th>
<th>Source Account</th>
<th>Reqmt/Sav. Account</th>
<th>Type</th>
<th>Annual Net Amount estimate</th>
<th>Iter Eff Date</th>
<th>Net Amt</th>
<th>Future Net Amt</th>
<th>Past/Corr Net Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PV</td>
<td>112115-00005-1000</td>
<td>112115-00000-1000</td>
<td>Salary Benefits</td>
<td>$7.5</td>
<td></td>
<td>$5,416.13</td>
<td>$5,416.13</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Document Changes in Payroll

**No records found to display.**
Primary Approver

• Canopy Main Menu
  – Place Cursor on Routing Tab
  – Click on Inbox
  – Click on the EGR Document number
Place Cursor on Routing
Click on Inbox
Click on EGR Document Number
Substitute Approver

• Following previous instructions to access your Inbox
• In the Search Field
  – Type the name of the primary approver
  – Click on search
  – Click on drop down arrow
  – Select the primary approver name
Substitute Approver

– Select the primary approver name
  System will auto-fill your selection in the Substitute field
– Click Submit
– Click on the EBR Document Number
  Review
– Select Appropriate Routing Action
– Click Submit
CONTACT

- For more Information on Creating EBRs, please contact:
  - **Dianne Alexander**
    Office of Budget & Reconciliations
    Phone: 936-261-2202
    E-Mail: dtalexander@pvamu.edu
  - **Alton Shillingford**
    Office of Budget & Reconciliations
    Phone: 936-261-2203
    E-Mail: alshillingford@pvamu.edu
  - **Raina McMillon**
    Office of Budget & Reconciliations
    Phone: 936-261-2204
    E-Mail: rnmcmillon@pvamu.edu