EMPLOYEE GRADUATE REQUEST (EGR)

OFFICE OF BUDGET & RECONCILIATIONS
TRAINING OBJECTIVES

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

– Access Canopy
– Log into Canopy
– Create a New Graduate Position
– Review and approve an EGR
CANOPY ACCESS

• **HOW TO ACCESS CANOPY**
  – Approved Account Profile
    • [http://www.pvamu.edu/pages/2279.asp](http://www.pvamu.edu/pages/2279.asp)
  – Canopy Internet Address
    • Training: [https://lab1.system.tamu.edu/Training/canopytwo/logon.aspx](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/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.

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 Summer Employment

• 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: 0007206
- Routing Document Number: 
- Document Type: Create or Reactivate Position (02)
- Action is Effective From-To: 11/15/2008 - 5/31/2009
- Doc FY: 2009
- Doc Status: Open for Editing
- Date Created: 11/05/2008 8:47 PM
- Last Updated: 11/05/2008 8:47 PM

Will Smith is being hired as Graduate Assistant Non-Teaching in the Office of Budgets & Reconciliations.

Position Information:

Add new attachment:
- Name:
- File location:
- (select one or type in your own)

Add Attachment
Position Information

• Administrative Location (Adloc)
  – 05XXXXXX

• Title Code
  • 7600 – GAT – Graduate Assistant Teaching
  • 9180 – GANT – Graduate Assistant Non-Teaching
  • 9221 – GAR – Graduate Assistant Research
Position Information

• Annual Term From/To: (Date Field)
  – Term of Position (9 or 3 months)
    • Rule
      – Date can only begin on the 1st or 16th
      – Date can only end on the 15th 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 for EGR
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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA Document Number</td>
<td>0007206</td>
</tr>
<tr>
<td>Routing Document Number</td>
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</tr>
<tr>
<td>Document Type</td>
<td></td>
</tr>
<tr>
<td>Action is Effective From-To</td>
<td>11/15/2009 - 5/31/2009</td>
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<td>Doc FY</td>
<td>2009</td>
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<td>11/05/2008 8:47 PM</td>
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<tr>
<td>Last Updated</td>
<td>11/05/2008 8:47 PM</td>
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<tr>
<td>Dept/SubDept</td>
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</tr>
<tr>
<td>Source Balance</td>
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</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Override Budget</td>
<td></td>
</tr>
<tr>
<td>RF Cost Sharing</td>
<td></td>
</tr>
<tr>
<td>TEES Cost Sharing</td>
<td></td>
</tr>
<tr>
<td>Replace Prior Iteration(s)</td>
<td></td>
</tr>
<tr>
<td>Justification/Comments</td>
<td>Will Smith is being hired as Graduate Assistant Non-Teaching in the Office of Budgets &amp; Reconciliations.</td>
</tr>
</tbody>
</table>

### Attachments

- Add new attachment:
  - Name: (select one or type in your own)
  - File location: 
  - Browse... 
  - Add Attachment

### Position Information

- PIN Number: P - New (Budget)
- Administrative Location: 
- Title Code: 9180
- Previous Title Code: 
- Annual Term From-To: 9/1/2008 - 5/31/2009
- Annual Term Modifier: Normal
- Annual Term Months: 0.0
- Position Action: Create PIN (CR)
- Assignment Dist/City: 

### Occupant Information

- Occupant UIN: 
- From/To Pin: 
- Document Name: 

### Notes

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:** 6510240
- **Title Code:** 9180
- **Previous Title Code:** 9/1/2008 - 5/31/2009
- **Position Action:** Create PIN (CR)
- **Assignment Dist/Cty:**
- **Annual Term:**
  - **From-To:** 9/1/2008 - 5/31/2009
  - **Annual Term Modifier:** Normal-No breaks in term
  - **Annual Term Months:** 0.0
- **Temporary PIN:**

### Occasional Information

- **Occupant UIN:** 689799619
- **Occupant SSN:**
- **Previous Occupant SSN:**
- **Occupant in Position From-To:**
- **Recommended Occupant Action:** New Hire (NH)
- **Employee Location:**
- **From/To Pin:**
- **Current Occupant Action:**
- **Previous Occupant Name:** Vacant (VA)
- **Current Occupant Action:**
- **Termination Reason:** Blank/None
- **Check Distribution:**

---

Will Smith is being hired as Graduate Assistant Non-Teaching in the Office of Budgets & Reconciliations.
Rate Information

• FTE Monthly/Hourly Rate of Pay
  – Hourly Rate of Pay for Title Code 9180
  – Monthly Rate of Pay for all other Graduate Titles

• Pay Indicator
  – “F” for Title Code 9180
  – “C” for all other Graduate Titles
Rate Information

• Source Control
  – Normal

• Pay Type
  – Normal
Click Save
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.

Record has been successfully modified (Message: 0003)

<table>
<thead>
<tr>
<th>Change Type</th>
<th>Edit</th>
<th>Validate</th>
<th>Close</th>
</tr>
</thead>
</table>

**EPA Document Information**

- **EPA Document Number**: 0002706 (coversheet)
- **Routing Document Number**: 
- **Document Type**: Create or Reactivate Position (02)
- **Action is Effective From-To**: 11/15/2008 - 05/31/2009
- **Source Balance Edits Overridden**: No
- **Dept/Sub/Dept**: 
- **Override Budget**: No
- **Replace Prior Iteration(s)**: No
- **Justification/Comments**: Will Smith is being hired as Graduate Assistant Non-Teaching in the Office of Budgets & Reconciliations.
- **Attachments**: 

**Position Information**

- **PIN Number**: P - New (Budget)
- **Base/New Iteration**: 00/01
- **Title Code**: 9180 GRADUATE ASSISTANT- NON-TEACHING
- **Previous Title Code**: 
- **Previous Position Action**: 
- **Assignment Dist/Cnty**: 

**Occupant Information**

- **Occupant UIN**: 
- **Occupant SSN**: 899-79-9619
- **Previous Occupant SSN**: 
- **Occu_Info**: 
- **Recommended Occupant Action**: New Hire (NH)
- **Employee Location**: 

**Rate Information**

- **Percent Effort**: 86.00%
- **Previous Percent Effort**: 
- **FTE Monthly/Weekly Rate**: $12.00
- **Previous FTE Monthly/Weekly Rate**: $0.00
- **Salary Action**: Blank - None
- **Employee Location**: 

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
  – Rule
    • 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
  • Object Code 1325 for Title Code 9221
  • Object Code 1525 for Title Code 9180
  • Object Code 1415 for Title Code 7600
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
  • Title Code 9180 Percent Effort can not exceed 88%

– MSO/SP Flags
  • Not Required
1.2 FUNDING SOURCE LINES

• Click:
  – Save
  – Validate
  – Close
**Justification/Comments:**
Will Smith is being hired as Graduate Assistant Non-Teaching in the Office of Budgets & Reconciliations.

**Position Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIN Number</td>
<td>P - New (Budget)</td>
</tr>
<tr>
<td>Advisor</td>
<td>05-110240 OFFICE OF BUDGETS AND RECONCILIATIONS</td>
</tr>
<tr>
<td>Title Code</td>
<td>91800 GRADUATE ASSISTANT - NON-TEACHING</td>
</tr>
<tr>
<td>Previous Title Code</td>
<td></td>
</tr>
<tr>
<td>Annual Term From-To</td>
<td>09/01/2008 - 05/31/2009</td>
</tr>
<tr>
<td>Position Action</td>
<td>Create PIN (CR)</td>
</tr>
<tr>
<td>Assignment Class/City</td>
<td></td>
</tr>
<tr>
<td>Base/New Iteration</td>
<td>00/01</td>
</tr>
<tr>
<td>Temporary PIN</td>
<td>No</td>
</tr>
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</table>

**Occupy Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Occupant UIN</td>
<td>899-75-9619</td>
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<tr>
<td>Previous Occupant SSN</td>
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</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>Employee Location</td>
<td></td>
</tr>
<tr>
<td>From/To PIN</td>
<td></td>
</tr>
<tr>
<td>Previous Occupant Name</td>
<td></td>
</tr>
<tr>
<td>Current Occupant Action</td>
<td>Vacant (VA)</td>
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<td>Termination Reason</td>
<td>Blank/None</td>
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<td>Check Distribution</td>
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</table>

**Rate Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Effort</td>
<td>86.00%</td>
</tr>
<tr>
<td>Pay Indicator</td>
<td>Biweekly - Student Worker (F)</td>
</tr>
<tr>
<td>Source Control</td>
<td>Normal</td>
</tr>
<tr>
<td>FTE Monthly/Hourly Rate</td>
<td>$12.00</td>
</tr>
<tr>
<td>Previous Percent Effort</td>
<td></td>
</tr>
<tr>
<td>Budgeted Salary</td>
<td>$16,537.00</td>
</tr>
<tr>
<td>Previous FTE Monthly/Hourly Rate</td>
<td>$0.00</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Normal</td>
</tr>
<tr>
<td>Previous Budgeted Salary</td>
<td>$0.00</td>
</tr>
<tr>
<td>Salary Action</td>
<td>Blank - none</td>
</tr>
</tbody>
</table>

**Funding Source Lines**

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>9180</td>
<td>08/03/2008</td>
<td>05 110240</td>
<td>0130</td>
<td>08</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>05/31/2009</td>
<td></td>
<td>110240</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
<td></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 VALIDATE
The document was validated and net funding was generated successfully.

### Funding Source Lines

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9180 - GRAD ASET NON TEACH</td>
<td>09/01/2008 to 05/31/2009</td>
<td>FY - 110249-00000</td>
<td>0130</td>
<td>88.00%</td>
<td>O/</td>
<td>$1,837.44 $16,537.00</td>
<td>$16,537.00</td>
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### Net Funding
This document was validated and net funding was generated successfully.

<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 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>110249-00000-1000</td>
<td>110249-00000-1000</td>
<td>Salary Benefits Longevity</td>
<td>$16,537</td>
<td>$11,827.20</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Document Changes in Payroll
No records found to display.
**Position Information**

- PIN Number: PPS518 (Budget)
- Title Code: 9180 GRADUATE ASSISTANT: NON-TEACHING
- Previous Title Code: 2270 GRADUATE ASSISTANT: TEACHING
- Annual Term From-To: 09/01/2009 - 05/31/2009
- Assignment Dist/Cnty:
- Temporary PIN: No

**Occupyant Information**

- Occupant UIN: 899-79-9619
- From/To Pin: Smith Will
- Previous Occupant Name: Vacant (VA)
- Recommended Occupant Action: New Hire (NH)
- Employee Location: Blank - none

**Rate Information**

- Percent Effort: 80.00%
- Pay Indicator: Biweekly - Student Worker (F)
- Previous Percent Effort: Blank
- FTE Monthly/Hourly Rate: $12.00
- Previous Monthly/Hourly Rate: Blank
- Budgeted Salary: $16,537.00
- Previous Budgeted Sal: Blank
- Pay Type: Normal

---

Document is now at desk SIGNER E** in Office OBAR on Campus PV (Message: 2216)

**Funding Source Lines**

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9180 - GRAD ASST NON TEACH</td>
<td>09/01/2009 to 05/31/2009</td>
<td>PV - 110246 - 00000 - 0002 OFFICE OF BUDGETS &amp; RECONCILIATIONS</td>
<td>0130</td>
<td>O/</td>
<td>$8.00%</td>
<td>Q/</td>
<td>$16,537.00</td>
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</tbody>
</table>

**Net Funding**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PV</td>
<td>110246-00900-0000</td>
<td>110246-00000-1000</td>
<td>Salary</td>
<td>$16,537</td>
<td>$11,827.20</td>
<td>$11,827.20</td>
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**Document Changes in Payroll**

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## Rate Information

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<td>Wages</td>
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<td>Previous Percent Effort</td>
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<tr>
<td>FTE Monthly/ Hourly Rate</td>
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<td>Previous Monthly/ Hourly Rate</td>
<td>$0.00</td>
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<tr>
<td>Salary Action</td>
<td>Blank - none</td>
</tr>
<tr>
<td>Pay Indicator</td>
<td>Biweekly - Student Worker (F)</td>
</tr>
<tr>
<td>Source Control</td>
<td>Normal</td>
</tr>
<tr>
<td>Budgeted Salary</td>
<td>$0.00</td>
</tr>
<tr>
<td>Previous Budgeted Sal</td>
<td>$0.00</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Normal</td>
</tr>
</tbody>
</table>

Document is now at desk SIGNED E** in Office VPBA on Campus PY (Message: 2216)

## Funding Source Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Title Code</th>
<th>Effective Dates</th>
<th>Campus - Account Object Code</th>
<th>Acct Analysis</th>
<th>Pgm Code</th>
<th>Pct Eft</th>
<th>MSU/SP Flags</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7560 - FED WORK-STUDY STUDENT</td>
<td>09/01/2007 to 05/31/2008</td>
<td>VP - BUSINESS AFFAIRS 1745 Wages-Study(Fed CWS)</td>
<td>4100</td>
<td>100.00%</td>
<td>0/</td>
<td>$6.25</td>
<td></td>
</tr>
</tbody>
</table>

**Net Funding**

No records found to display.

**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 EGR Document Number
– Review
– Select Appropriate Routing Action
– Click Submit
CONTACT

For more Information on Creating EGRs, please contact:

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Office of Budget & Reconciliations
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E-Mail: dtalexander@pvamu.edu

**Alton Shillingford**
Office of Budget & Reconciliations
Phone: 936-261-2202
E-Mail: alshillingford@pvamu.edu

**Raina McMillon**
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E-Mail: rnmcmillon@pvamu.edu