TRAINING OBJECTIVES

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

– Access Canopy
– Log into Canopy
– Create a New Wage Position
– Review and approve an EWR
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 Wage PIN

• 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
Canopy
The Texas A&M University System

Main Menu ⊂ EPA ⊂ Document Details

Search Employee Details Position Details Document Create New Doc

EPA Document Number: 0006502 Comments:
Submit Recall Reopen Withdraw Cancel and Void

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: 0006502
Routing Document Number:
Doc FY: 2008
Doc Status: Open for Editing
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. Not Applicable for EWR
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
• Source Balance Edits Overridden
  – Check if Action Effective From/To dates are not the same as Annual Term and/or Funding Source Lines dates
• Replace Prior Iteration
  – Only required when making changes to a current PIN for the same period.

• Justification/Comments
  – Include Funding Requirement
  – EPA maybe rejected by Payroll if Funding Requirement is not included
4 Close the document and route it for approval.

**EPA Document Information**

- **EPA Document Number:** 0006502
- **Routing Document Number:**
- **Document Type:** Create or Reactivate Position (32)
- **Action is Effective From-To:** 9/1/2007 - 5/31/2008
- **Doc FY:** 2008
- **Doc Status:** Open for Editing
- **Date Created:** 11/09/2007 5:00 PM
- **Last Updated:** 11/09/2007 5:00 PM
- **Dept/SubDept:**
- **Source Balance:**
- **Edits Overridden:**
- **Override Budget:**
- **Replace Prior Iteration(s):**
- **Justification/Comments:**
  
  Clark Kent is being hired as a Federal Work-Study Student in the VPEA Office. Funding Requirement is $11,000.00.

**Attachments:**

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

• Administrative Location (Adloc)
  – 05XXXXXX

• Student Title Codes
  • 7557 - State Work-Study Student
  • 7560 - Federal Work-Study Student
  • 7561 - Student Worker I
  • 7565 - Co-Op Student Intern
Position Information

• Non Student Title Codes
  – Please refer to the Human Resource Website @ the following link:
  http://www.pvamu.edu/pages/2078.asp
• Annual Term From/To: (Date Field)
  – Term of Position
    • Date Rules
      – 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 EWR
Office. Funding Requirement is $11,000.00

Position Information

PIN Number: P - New (Wage)
Administrative Location: 05110300
Title Code: 7560
Previous Title Code: 
Annual Term From-To: 9/1/2007 - 5/31/2008
Position Action: Create PIN (CR)
Assignment Dist/Cty: 

Base/New Iteration: 00/01
Annual Term Modifier: Normal-No breaks in term
Annual Term Months: 0.0
Temporary PIN: 
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)
### Occupant Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant UIN</td>
<td></td>
</tr>
<tr>
<td>Occupant SSN</td>
<td>866223481</td>
</tr>
<tr>
<td>From/To Pin</td>
<td></td>
</tr>
<tr>
<td>Occupant Name</td>
<td>Kont</td>
</tr>
<tr>
<td>(suffix)</td>
<td></td>
</tr>
<tr>
<td>Clark</td>
<td>(middle initial)</td>
</tr>
<tr>
<td>Previous Occupant SSN</td>
<td></td>
</tr>
<tr>
<td>Occupant in Position From-To</td>
<td></td>
</tr>
<tr>
<td>Recommended Occupant Action</td>
<td>New Hire (NH)</td>
</tr>
<tr>
<td>Employee Location</td>
<td></td>
</tr>
<tr>
<td>Previous Occupant Name</td>
<td></td>
</tr>
<tr>
<td>Current Occupant Action</td>
<td></td>
</tr>
<tr>
<td>Termination Reason</td>
<td></td>
</tr>
<tr>
<td>Check Distribution</td>
<td></td>
</tr>
</tbody>
</table>

### Rate Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Effort</td>
<td>Wages</td>
</tr>
<tr>
<td>Previous Percent Effort</td>
<td></td>
</tr>
<tr>
<td>FTE Monthly/ Hourly Rate</td>
<td>0.00</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>Blank</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 Salary</td>
<td>$0.00</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Normal</td>
</tr>
</tbody>
</table>

**Save** | **Cancel**
Rate Information

• FTE Hourly Rate of Pay
  – Student Rate Guidance set by Student Employment Office
  – Non-Student Rate Guidance set by the Compensation Pay Plan and Human Resource Office

• Pay Indicator
  – “F” for all Student Titles
  – “E” for all Wage Titles
Rate Information (Con’t)

• Source Control
  – Normal
• Pay Type
  – Normal
Rate Information

Percent Effort: Wages
Previous Percent Effort: 
FTE Monthly/Hourly Rate: $6.25
Previous Monthly/Hourly Rate: $0.00
Salary Action: Blank - none

Pay Indicator: Biweekly - Student Worker (F)
Source Control: Normal
Budgeted Salary: $0.00
Previous Budgeted Sal: $0.00
Pay Type: Normal

Record has been successfully modified (Message: 0003)

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 Eff</th>
<th>MSU/SP Flags</th>
<th>Hourly Rate</th>
<th>Edit</th>
<th>Replicate Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7560 - Description not found</td>
<td>to</td>
<td>** Account not found ** Description not found</td>
<td>0.00%</td>
<td>/</td>
<td>$6.25</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.
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 1st or 16th
    - Date can only end on the 15th or the last day of the perspective month

- **Campus Code**
  - “05”

- **Account**
  - Determined by Unit
1.2 FUNDING SOURCE LINES

- Student Object Code
  - Object Code 1750 for Title Code 7557
  - Object Code 1745 for Title Code 7560
  - Object Code 1746 for Title Code 7560 - Community Service
  - Object Code 1740 for Title Code 7561
  - Object Code 1740 for Title Code 7565
1.2 FUNDING SOURCE LINES

– Non-Student Object Code
  • Classified Titles 1720
  • Professional Titles 1715
1.2 FUNDING SOURCE LINES

– Acct Analysis Code

• 4130 – Account Range 110000 – 117999
  (Student Workers Only)
• 0130 – Account Range 110000 – 117999
• 0915 – Account Range 112000 – 112090
• 0132 – Account Range 170202 – 178028
1.2 FUNDING SOURCE LINES

- Acct Analysis Code
  - 0159 – Account Range 118581 – 118587
  - 0766 – Account Range 180000 – 189999
  - 5410 – Account Range 200000 – 299999
  - 5211 – Account Range 300000 – 399999
  - 5100 – Account Range 400000 – 499999
1.2 FUNDING SOURCE LINES

– Acct Analysis Code (continued)
  • 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
  - Must total 100

- MSO/SP Flags
  - Not Required

• Click:
  - Save
Rate Information

Percent Effort: Wages
Previous Percent Effort: 
FTE Monthly/Weekly Rate: $6.25
Previous Monthly/Weekly Rate: $0.00
Salary Action: Blank - none

Pay Indicator: Biweekly - Student Worker (F)
Source Control: Normal
Budgeted Salary: $0.00
Previous Budgeted Salary: $0.00
Pay Type: Normal

Funding Source Lines Transaction Successful

<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>NSD/SP Flags</th>
<th>Hourly Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7560 - FED WORK-STUDY STU</td>
<td>09/01/2007 to 05/31/2008</td>
<td>PU - 118320 00000 1745 Wages-Stndn(Fed CWS)</td>
<td>4130</td>
<td>100.00</td>
<td>0/</td>
<td></td>
<td>$6.25</td>
</tr>
</tbody>
</table>

Net Funding

No records found to display.

Document Changes in Payroll

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

**No records found to display.**

**Document Changes in Payroll**

No records found to display.
Click CLOSE
Rate Information

<table>
<thead>
<tr>
<th>Percent Effort</th>
<th>Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Percent Effort</td>
<td></td>
</tr>
<tr>
<td>FTE Monthly/ Hourly Rate</td>
<td>$6.25</td>
</tr>
<tr>
<td>Previous Monthly/ Hourly Rate</td>
<td>$0.00</td>
</tr>
<tr>
<td>Salary Action</td>
<td>Blank - none</td>
</tr>
</tbody>
</table>

Pay Indicator: Biweekly - Student Worker (F)
Source Control: Normal
Budgeted Salary: $0.00
Previous Budgeted Sal: $0.00
Pay Type: Normal

Document is now at desk SIGNER 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 STU</td>
<td>09/01/2007 to 05/31/2008</td>
<td>PV - 110300-00000 VP - BUSINESS AFFAIRS 1745 Wages-Stdnt(Fed CWS)</td>
<td>4100</td>
<td>100.00%</td>
<td>O/</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 EWR Document number
Place Cursor on Routing
Click on Inbox
<table>
<thead>
<tr>
<th>Document</th>
<th>Action</th>
<th>Status</th>
<th>Arrival Date</th>
<th>Summary</th>
<th>Account</th>
<th>Total</th>
<th>Creator</th>
<th>Create Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>EWRPV0006587</td>
<td>Revise</td>
<td>Recalled</td>
<td>01/31/2008</td>
<td>EWR: Wolverine X-men - Wage Position -</td>
<td><em>see doc</em></td>
<td></td>
<td>ALEXANDER, DIANNE T</td>
<td>01/25/2008</td>
</tr>
<tr>
<td>EWRPV0006585</td>
<td>NtFY/Final</td>
<td>Final</td>
<td>01/14/2008</td>
<td>EWR: Morris Chestnut - Wage Position -</td>
<td><em>see doc</em></td>
<td></td>
<td>ALEXANDER, DIANNE T</td>
<td>01/14/2008</td>
</tr>
<tr>
<td>EWRPV0006584</td>
<td>NtFY/Final</td>
<td>Final</td>
<td>01/14/2008</td>
<td>EWR: Will Smith - Wage Position - P</td>
<td><em>see doc</em></td>
<td></td>
<td>ALEXANDER, DIANNE T</td>
<td>01/14/2008</td>
</tr>
<tr>
<td>EBRPV0006687</td>
<td>NtFY/Final</td>
<td>Final</td>
<td>01/14/2008</td>
<td>EBR: Snow White PIN: P05316</td>
<td><em>see doc</em></td>
<td></td>
<td>ALEXANDER, DIANNE T</td>
<td>01/14/2008</td>
</tr>
<tr>
<td>EWRPV0006588</td>
<td>NtFY/Final</td>
<td>Final</td>
<td>01/14/2008</td>
<td>EWR: Red Hood - Wage Position - P</td>
<td><em>see doc</em></td>
<td></td>
<td>ALEXANDER, DIANNE T</td>
<td>01/14/2008</td>
</tr>
<tr>
<td>DBRPVU800001</td>
<td>NtFY/Final</td>
<td>Final</td>
<td>02/11/2008</td>
<td>Permanent Hire - Chestnut</td>
<td><em>see doc</em></td>
<td>$36,726.00</td>
<td>ALEXANDER, DIANNE T</td>
<td>02/11/2008</td>
</tr>
</tbody>
</table>
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 EWR Document Number
– Review
– Select Appropriate Routing Action
– Click Submit
For more Information on Creating EGRs, please contact:

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