PRAIRIE VIEW A&M UNIVERSITY

EMPLOYEE BUDGET REQUEST (EBR)

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 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: <u>https://sago-apps.tamu.edu/canopy/logon.aspx?c=1</u>
 - 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

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- Select Create Type:
 - New Budgeted Position
- Enter Workstation:
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- 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

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2 Validate the document (thi	s will also generate the net funding).				
3 Review the net funding and	d make any necessary changes to the account info	rmation.			
4 Close the document and re	oute it for approval.				
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EPA ON SCREEN HELP

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 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

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Position Information

- Administrative Location (Adloc)
 - -05XXXXXX
- Title Code
 - Please refer to Human Resource Web Site <u>http://www.pvamu.edu/pages/2078.asp</u>
 - 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 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 Faculty Appointments

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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)

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Previous Title Code: Annual Term From-To:	9/1/2008	Annual Term Modifier:	Normal-No breaks in term		
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Occupant Information					
Occupant UIN:		From/To Pin:	-		
Occupant SSN:	899999999	Occupant Name:	Chestnut (last name)		
			(suffix)		
			Morris (first name)		
			F (middle initial)		
Previous Occupant SSN:		Previous Occupant Name:			
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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</p>

Rate Information

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

Interview
Previous Coupant UN: Occupant SN: B999999 Occupant Name: Chestination Cocupant SN: B9999999 Occupant Name: Cocupant Name: Cocupant Name: Cocupant Name: Cocupant Name: Cocupant SN: B9999999 Occupant Name: Cocupant Name: Cocupant Name: Cocupant Name: Source Control: NameNet Reson: Bank/None Previous Cocupant SN: Source Control: NameNet Reson: Bank/None Previous Societt Effort: Source Control: NameNet Reson: Previous Societt Effort: Source Control: Na
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					(suffix)						
					Morris	(first na	ame)				
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 - Delete
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 - EPA requires at least 1 Funding Source Line

- 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

- Object Code

- Determined upon the Title
- Do not select Object Codes in the 1700 Series

-Acct Analysis Code

- 0130 Account Range 110000 117999
- 0915 Account Range 112000 112090
- 0159 Account Range118581 118587
- 0132 Account Range 170202 178028
- 0766 Account Range 180000 189999

-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

-Pgm Code

- Only required for Campus 08 Accounts
- -Percent Effort
 - Should equal Rate Information Percent Effort
- -MSO/SP Flags
 - Not Required

- Click:
 - Save
 - Validate
 - Close

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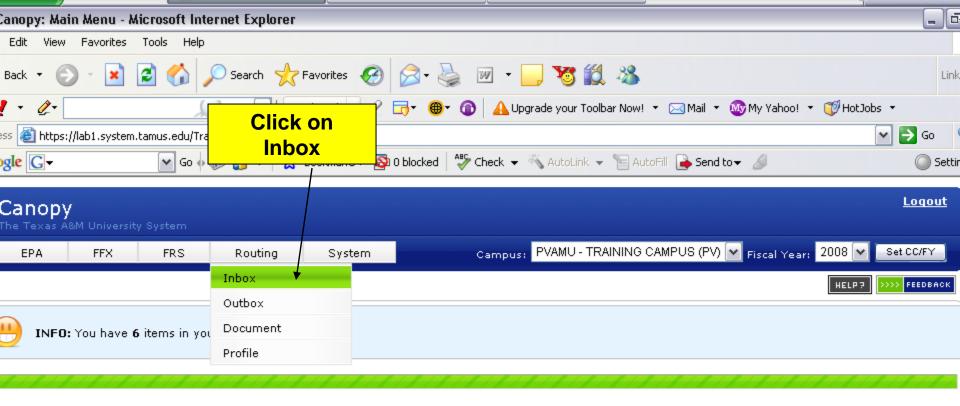
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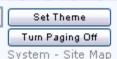


– Available Modules

- EPA Personnel Action Module
- FFX Fixed Assets Module
- FRS Financial Reporting Module
- Routing Document Routing Module
- System System Settings and General Information

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- In the Search Field
 - Type the name of the primary approver
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 - Click on drop down arrow
 - Select the primary approver name

Substitute Approver

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- Click Submit
- Click on the EBR Document Number
- Review
- Select Appropriate Routing Action
- Click Submit

CONTACT

 For more Information on Creating EBRs , please contact: <u>Dianne Alexander</u> Office of Budget & Reconciliations

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Raina McMillon

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