Canopy
The web front end for the FAMIS and BPP systems.
How to get access to CANOPY

• A FAMIS access request (AG-701) must be submitted and approved by your business office in order to be granted access to the FAMIS/Canopy System.
  – An access request for CANOPY automatically gives you access to FAMIS and vice versa.

• URL = canopy.tamu.edu
What is Canopy

- CANOPY is the web based portal of FAMIS. It is the “Face” of the FAMIS system on the internet. Almost every place where you read or see FAMIS mentioned, you can substitute CANOPY.

- It has many of the same information and features of FAMIS, but with a familiar Windows look and feel.

- CANOPY offers some features not available in FAMIS, like e-mail Inbox notification.

- Some activities can only be accomplished in CANOPY and others can only be accomplished in FAMIS.
  - EPA documents can only be created in CANOPY.
  - Purchasing documents can only be created in FAMIS.
  - Routing and approvals, inboxes and outboxes can be viewed both in CANOPY and FAMIS.
Logging on to Canopy

Enter FAMIS ID and Password
Changing Password

- Click to add text
- Re-enter your user ID
- Enter your current password
- Enter a new password
Password Rules and Tips

• All passwords must be 8 characters in length and include at least one alphabetic and one numeric character. You may use &, # or $ but you may not use * or / in your password.

• A list of reserved words (such as aggies or gigem) will be checked to ensure that they are not included in the password.

• Passwords are required to be changed at an interval of no greater than 90 days.

• Logon IDs that have had seven (7) consecutive incorrect password attempts will be revoked.

• A recent history of passwords will be retained to prevent their reuse for a logon ID.

• Logon IDs that have not been used in a period of six (6) months will be revoked.

• Inactive logon IDs will be removed from the system six (6) months after their deactivation/revocation date.
CANOPY Banner

- At the top of every page you will see the following CANOPY banner:

  The 5 buttons, EPA FFX, FRS, Routing & System will take you to those modules.

  The campus drop down lets you change from one campus to another, if you have that access.

  The fiscal year drop down lets you view prior year's fiscal records.

  Logout link, makes logging off easy!
A Few Basics

• Tabs
  – A secondary navigation tool to help you move between similar data. Therefore, you will see different tab group if you are reviewing an EPA document versus looking at an account, routing document, or purchasing document. The current page is always selected. Regardless of your theme selection, the selected tab will stand out.
  • Example:
    – FRS>Account tabs – My Favorites Selected
Campus and Fiscal Year Selection

• When you are in the FFX (assets) and FRS (accounting) submenus, you may be allowed to change your campus code (CC) and fiscal year (FY).
  – When you are in the EPA and Routing systems, campus code and fiscal year are not directly associated with the data you can access. For example, documents that require your approval are in your inbox because of the request routing action. Campus and Fiscal year are secondary attributes on these records.

If you have access to multiple campuses, select one from the list.

• **Remember:** You must click the ‘Set CC/FY’ button for changes to take affect.
Home Page

- New “Recently Visited” menu.
- Change the color scheme by picking a style theme.
Routing Profile

• The Routing Profile is part of the System Profile page.
• Click on the Edit Button to change your Routing Profile
• Remember to Save any changes, closing this window or canceling will void any changes.

• The Profile section displays settings for notifying you when documents are routed to you. These settings include what types of documents to display, how often, and shows the email address to be used.

• Voided Approvals allows you to receive an email notification when someone in the Routing path beyond you has rejected a document.

Note: Different approval sets can be applied to EPA documents from those of other Routing documents icon.
Canopy System Profile

- Shown in the image below are the Default settings.

Remember to save any changes, closing this window or canceling will ignore any changes.

Note: Turning paging off, or having large page sizes and having a large number of records, will dramatically slow down the speed your pages will be loaded.

Note: These setting may not affect ALL pages; some pages are set programmatically for optimal viewing and data retrieval.
Account Search’s

- Select FRS
- Account
- Account Search

You can search by entering your Dpt/Subdpt combination.

Remember you can only access accounts that have been identified in your Business office with your Sub-Department.

In order to display all of your accounts, you must change show support accounts to “yes”.
Account Favorites

- Ability to create multiple favorite account lists and title each differently
- How to create Favorite list:
  - FRS
    - Account Search
  - From here you will need to check the boxes of the accounts you wish to add to your favorite list.
    - Click the Add button to add the accounts you select, or you can click the box under the add button to add all accounts in the list.
Account Summary Tab

- **FRS**
  - **Account**
    - Click on the account you wish to view
    - From here you can view the summary of the account.
    - By clicking the arrow located on the left hand side, transactions for that particular object class code will be displayed.
Open Commitments

- The open commitment tab shows items that are encumbered but not paid.
  - You can choose to search by particular month, or object class code.
Transactions Tab

- The transactions tab will allow you to view all transactions that have hit within a particular time frame.
  - You can also search using your departmental reference, Ref 4, or the fiscal reference, Ref 2.
Payroll Tab

- The Payroll tab shows the payroll transactions for that account, by person.
  - You can also search by the entire fiscal year or month by month.
Reports Tab

- The Reports tab will allow you to print a summary of your account.
  - You can also download multiple accounts to an excel spreadsheet or a pdf.
Vouchers Tab

- This tab will allow you to view all vouchers applied to a particular account.
A few hints…..

This button will allow you to download directly to a spreadsheet.

Each category title is a sortable link.
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Congratulations!

This is to certify successful completion of the *Introduction to Canopy* Online Training.