

Canopy Classroom Training

Canopy is the web based portal of FAMIS which is the mainframe. It has many of the same information and features of FAMIS but with a familiar “Windows” feel.

EPA, DBR, TDP and DCR documents can only be created in Canopy.
Creating purchase documents (L, E, and R) and Receiving can only be done in FAMIS.
Routing and approvals inboxes and out boxes can be viewed in both.

FRS

FFX

EPA

Canopy Modules – The menu bar is at the top left and contains all Modules EPA, FFX, FRS, ROUTING “System” houses general information about Canopy. Access to each module is based on the user’s security access.

The modules have acronyms that are used throughout Canopy.

The Canopy modules on the menu bar have menu options which are additional screens in the module

**Go to EPA, FRS, FFX, Routing and System show drop down

Access to Modules is based on the Security setting for each user. Attempting to use a module you are not permitted to use will generate an error message.

Canopy Menu- On the right side of the menu is the filter to select a fiscal year. There is also the Feedback link. Your feedback goes to the Canopy Programmers at the System Offices.

Go to dropdown and show the campuses that there is access for.

The System menu houses the user’s profile. You may update your profile whenever it is needed.

FRS Search Menu

Show dropdown see page 7

Each Submenu item can be located by using the menu at the top or by clicking on the page tabs. These are the FRS Search Submenu items

The Purchas Document Submenu on the FRS module contains a menu for looking at all purchase Docs (E’s, L’s, R’s and P’s).

The invoices Submenu on the FRS module contains a menu for looking at invoices posted against purchasing documents. The invoices are from the vendors

The Receiving Submenu on the FRS module contains a menu for looking at Receiving on all purchasing Documents

The Vendor Submenu on the FRS contains a menu for looking at documents, Invoices and Vouchers by Vendor

The Voucher option on the FRS menu contains a menu to search for vouchers

FRS Account Search

The FRS Account search allows you to locate accounts by one or more fields.

Account, Department, Sub Department, Responsible person and Title. You only have to fill one of these in if you are limited. Select the 'Show Support Accounts' to see all support accounts Click the Search button

If these accounts are ones that you will use all of the time you can click 'add' and the account will be visible under the "My Accounts" tab.

Once accounts are added to My Accounts, then the balance will always be available from the FRS Account menu, My Account sub menu

The Unprotected Available is the current balance on the account. The user can also remove the account from the personalized list by clicking 'remove'

When you click on the actual account number it will take you to the Account Summary by object code-like Screens 19 and 069 in FAMIS. The Account Summary defaults to the Detail display. The detail will display transactions subtotaled by object code in Budget Pool categories. This is similar to Screen 019 in FAMISD

**Click on the SL display dropdown and you will be able to see the totals by Budget Pools like Screen34. The summary shows the totals.

Open Commitment tab from the FRS menu shows all pending expenses for the account selected. The Ref 1 column houses the FAMIS document number or other reference. The Description may be a business or person who will receive payment.

The Transactions tab shows all of the transactions for selected account in object code order.

The FRS report option allows you to download a statement for the account. The report can either be a PDF or an Excel workbook Select a month and push one of the download buttons

The Purchas Doc Search allows you to locate documents by using 1 or more fields. Choose the appropriate class and then Submit. The results display as a list based on the search fields that the user populated. Clicking on the Blue Document number will take you to the Purchasing document Header-Screen 240 for L-docs shows the vendor, date created and status of the document

Invoice Search: Enter the document number to see a list of Invoices for that Purchasing document (similar to screen 350). Click on the Invoice number to see the invoice header (Screen 341). If you see the PIP box with a piece of paper in it, click on it to read the PIP. PIP is a Purchasing Invoice Problem used by Accounts Payable to let you know that the invoice has a problem which needs to be fixed before it will be paid. Always read the comments from the AP auditor. The invoice header shows the vendor, receiving date and matching status to the purchasing document. The Invoice header also has links to the Vendor Detail and Invoice line items.

****Click on the Blue vendor number to show**

****Click on the line item to see detail**

The Voucher Tab displays all of the vouchers payments that have processed on the selected account.

****Click on the Voucher number to view more information about the payment. You can see how the payment was made. If it was paid by check you can see the check number.**

Canopy In-box under the Routing Tab This is the same as Screen 910. To sort columns, click on Column title Clicking once sorts in descending order, clicking twice sorts in ascending order. The Approve Action will only show up if the document needs your approval

Users who create documents will have many notifications in their in-box for PLP-PEP, PRQ, PIP, DCR and DBR documents. Notifications of Approved EPA, EWR EBR and EGR are also shown. Approvers and Signers will also have documents in their in-box that requires action.

You can look into anyone's in-box by using the substitute box. Click on the document and you can see the document routing history, notes, item information, accounts PIP etc.

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If you are a Substitute Approver or Signer you must use the Substitute box and enter that person's name to be allowed into that user's in-box. You will only be able to do this if the AG-702 designated you as a substitute signer and you are on the routing desk in FAMIS.

Routing Action: Go to dropdown box.

Approving the document sends it to the next signer. If you are the final signer you can approve, reject or forward to another person to approve. Approvers should not need to recall a document.

Your Profile:

Routing profile tab- Click on the Profile Tab to select the options for how you want to receive the e-mail notifications from Canopy and FAMIS. The e-mail notices let the user know when there is a document in their in-b\ox which requires some kind of action.

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FRS TAB

1. Search
 - a. Account Search
 - b. Subcode Search
 - c. Batch Search
 - d. DBR Search
 - e. Invoice Search
 - f. PIP Search
 - g. Purch Doc Search
 - h. Receiving Search
 - i. Vendor Search
 - j. Voucher Search
2. Account
 - a. Account Search
 - b. Subcode Search
 - c. My Accounts
 - d. Attributes
 - e. Summary
 - f. Open Commitments
 - g. Transactions
 - h. Payroll
 - i. Reports
 - j. Vouchers
3. Batch
 - a. Batch Search
 - b. Batch Transactions
4. Prep budget
 - a. Upload
5. DBR
 - a. DBR Search
 - b. DBR Document
 - c. Create DBR
6. DCR
 - a. DBR Search
 - b. DBR Document
 - c. Create DBR

7. Invoices

- a. Invoice Search
- b. Invoice Header
- c. Line Item Details
- d. Notes
- e. PIPS
- f. PIP Search

FRS TAB

8. Payroll

- a. Payroll by Account
- b. Payroll by UIN
- c. Payroll Encumbrance
- d. Payroll Transactions

9. Preliminary Assets

- a. Pre Asset Search
- b. Pre Asset Document
- c. Create Pre Asset

10. Purch Documents

- a. Purch Doc Search
- b. Purch Doc Header
- c. Line Item Details
- d. Notes
- e. Good Faith Effort
- f. Tracking
- g. SciQuest Cross Ref

11. Receiving

- a. Receiving Search
- b. Receiving Header
- c. Line Item Details
- d. Notes

12. Tables

- a. Departments Table
- b. GL Account Controls

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c. SL Object Codes

13. Vendors

- a. Vendor Search
- b. Vendor Detail
- c. Documents by Vendor
- d. Invoices by Vendor
- e. Vouchers by Vendor
- f. Master Vendor Search

14. Vouchers

- a. Voucher Search
- b. Voucher Header
- c. Line Item Details
- d. Vendor

FFX TAB

1. Search

- a. Asset Search
- b. Attribute Search
- c. Building Search
- d. Room Search
- e. Department Search
- f. Transfer Search
- g. Sequence Search

2. Assets

- a. Asset Location
- b. Asset Transactions

3. Transfer

- a. Transfer Search
- b. Transfer Document
- c. Create Transfer

4. Tables

- a. Class Table
- b. Miscellaneous Tables

5. Batch

- a. Batch Search
- b. Batch Transactions

Routing TAB

- 1. Inbox
- 2. Enroute
- 3. Outbox
- 4. Document
- 5. Global Queue
- 6. Profile

EPA TAB

- 1. Search
- 2. Employee Details
- 3. Position Details
- 4. Document Details
- 5. Create Document

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M22: Purchasing Inquiry Menu		
	Purchasing Document Inquiry	
	272 – Documents by Status	
	278 – Document Inquiry	Please refer to flowchart
	288 – Document Summary	
	Tracking Purchase Documents	
	281 – Document Browse by Dept/Sub-dept	Forgotten PO# can be found
	284 – Document Browse by User Reference	Forgotten PO# can be found
	285 – Document Browse By Vendor	
	290 – Document Tracking Inquiry	Track R# to B# to P#
	291 – Document Tracking Cross Reference	Track P# to B# to R#
	295 – AggieBuy Document Crossover Screen	
M32: Purchasing Receiving Menu		
	330 - Receiving Documents by Document Number	
	331 - Receiving Documents by Ship to Department	
	275 - Incomplete Receiving/Invoicing	
M34: Purchasing invoice Menu		
	350 – Invoice Inquiry by PO Document	
	351 – Invoice Inquiry by Vendor	
	358 – Invoice Document Inquiry	
	359 – Invoice Item Summary	