

To check for documents that are pending approvals go to "ROUTING" and then select **INBOX**
 You can check other inboxes by typing the person's *last name, first name* and clicking 'Search' in the 'Substitute' box
 Screen 910 in Famis for Inbox and 912 for Outbox

The screenshot shows the Canopy routing interface. At the top, it says "Canopy The Texas A&M University System". Below that are navigation tabs: EPA, FFX, FRS, Routing, System. The "Routing" tab is selected. On the right, there are fields for "Campus: TEXAS A&M UNIV-CORPUS CHRISTI (15)", "Fiscal Year: 2011", and a "Set COPY" button. Below this is a "Main Menu" with "Routing" selected and "Inbox" highlighted. A "Send Feedback" button is also present. The main area contains a "Document:" field, a "Substitute:" dropdown menu (circled in red), a "Search for Substitute:" field, and a "Search" button. Below these is an "Approval Only:" section with radio buttons for "Yes" and "No", and a "Submit" button. At the bottom, it says "INBOX CONTENT (TOTAL ITEMS: 4) DEFAULT VIEW".

INBOX CONTENT (TOTAL ITEMS: 8) DEFAULT VIEW

Document	Action	Status	Arrival Date	Summary	Account	Total	Creator	Create Date	Quick Action
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You can also view:

- Enroute** Documents that are pending approval
- Outbox** All documents that have been created, approved and sent out or forward for approval
- Document** Enter a specific document number
- Global Queue** Search by Campus, Days, Form, Exec. Level, Division, School, Dept, Subdept, Curr Office, Curr Desk
- Profile** Famis User Profile, Routing Notification Profile, Canopy System Profile Setting (when making any changes always hit "save")

Reviewing Accounts , Creating and Searching for Documents

The screenshot shows the Canopy FRS menu. At the top, it says "Main Menu - FRS" and "Send Feedback". Below this is a list of menu items, each with a circular icon and a description:

- **Search** - Account Search, Subcode Search, Batch Search, DBR Search, Invoice Search, PIP Search, Furch Doc Search, Receiving Search, Vendor Search, Voucher Search
- **Account** - Account Search, Subcode Search, My Accounts, Attributes, Summary, Open Comm, Transactions, Payroll, Reports, Vouchers
- **Batch** - Batch Search, Batch Transactions
- **Prep Budget** - Upload
- **DBR** - DBR Search, DBR Document, Create DBR
- **DCR** - DCR Search, DCR Document, Create DCR
- **Invoices** - Invoice Search, Invoice Header, Line Item Details, Notes, PIPS, PIP Search
- **Payroll** - Payroll by Account, Payroll by UIN, Payroll Encumbrance, Payroll Transactions
- **Preliminary Assets** - Pre Asset Search, Pre Asset Document, Create Pre Asset
- **Furch Documents** - Furch Doc Search, Furch Doc Header, Line Item Details, Notes, Good Faith Effort, Tracking, SoQuest Cross Ref
- **Receiving** - Receiving Search, Receiving Header, Line Item Details, Notes
- **Tables** - Departments Table, GL Account Controls, SL Object Codes
- **Vendors** - Vendor Search, Vendor Detail, Documents by Vendor, Invoices by Vendor, Vouchers by Vendor
- **Vouchers** - Voucher Search, Voucher Header, Line Item Details, Vendor

SEARCH

Canopy
The Texas A&M University System

EPA FFX FRD Routing System

Main Menu » FRS » Search

- Account Search
- FRS Subcode Search
- FRS Batch Search
- DBP Search
- Invoice Search
- FIP Search
- Document Search
- Receiving Search
- Vendor Search
- Voucher Search

ACCOUNT

Main Menu » FRS » Account » Account Search Send Feedback

Account Search | Subcode Search | My Accounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers

Account number: Department: BUD Sub-department: Show support accounts: Yes No
 Responsible person (last, first): Title: Show deleted accounts: Yes No

SEARCH RESULTS (from 1000 to 41)

Account	Description	Dept	Sub Dept	Responsible Person	Add
120025-00000	ASFA FEE/FE	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
120027-00000	ASFA INCENTIVE RADS FEB/MAR 2011	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
120028-00000	ASFA INCENTIVE RADS APR/MAY 2010	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
120032-00000	BUDGET	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
120089-00000	STATE BUDGET CHANGE	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121000-00000	STAFF BENEFITS PD BY STATE-INSTRU	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121001-00000	STAFF BENEFITS DIRECT - RESEAR CH	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121002-00000	STAFF BENEFITS DIRECT - PUBLIC SERV	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121004-00000	STAFF BENEFITS DIRECT - ACADEMIC SVJ	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121005-00000	STAFF BENEFITS DIRECT - STUDENT SVC	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121006-00000	STAFF BENEFITS DIRECT - INSTITUTION	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121007-00000	STAFF BENEFITS DIRECT - PLANT	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121010-00000	STAFF BEN PD BY APFN - INSTRUCTION	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121011-00000	STAFF BEN PD BY APFN - RESEARCH	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121012-00000	STAFF BEN PD BY APFN - PUBLIC SERV	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121014-00000	STAFF BEN PD BY APFN - ACADEMIC SLF	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>
121015-00000	STAFF BEN PD BY APFN - STU SERV	BUDG		Wedgeworth, Kimberly E	<input type="checkbox"/>

Download Excel File

Check the box for accts you would like to add as your favorites

Subcode Search

Main Menu » FRS » Account » Subcode Search

Account Search | Subcode Search | My Accounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers

Subcode: Department: Sub-department:

From Account: To Account: Thru Month: Jan Account type: SL

My Accounts

Account Search | Subcode Search | My Accounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers

Account Search

DEFAULT ACCOUNT GROUP ACTIVE ACCOUNT LIST:

* You can change this list from the AccountSearch page.

ACCOUNT LISTS

List Name	Total Items
Default Account List	0

Add a New Account List (Name):

Accounts that you have selected as your "Favorite" Accounts - You will always see a brief snap shot of the account

Attributes

Screen 6 in Famis (Base Accounts) and 74 (Support Accounts)

Summary of how the account is set up

Select an account: or type in an account number:

Core Information

Account Title: BUDGET	Freeze Flag: N	SA Transactions
Responsible Person: Wedgeworth, Kemberly E 114-00-6591	Drop Flag: N	Budget Actuals
Resp Accountant: Castorena, Yolanda 301-00-7115	Delete Flag: N	Expense: N N
Map Code: 12000	SA Create Enable: N	Revenue: N N

Account Hierarchy

Primary:	Campus	Department	Sub Department	Exec Level	Division	College	Mail Code	Statement
Secondary:		BUDG		FA	FS			
Admin:								
Center:								

Financial Reporting

AFR Fund Group: 10	Function: 35	Element of Cost: IS
Fund Group: FG	Sub Function:	Sub Element of Cost:
Sub Fund Group:	Aux Code:	Effort Category: IGAD
Sub Sub:	Rev Fledged:	Restricted:
Fund Source:		

Budget and Operations

ABR Rule: 001	Gen Exp Bud:
Bottom Line Ctrl: Y	Delg Type:
Default Cat Ctrl: 0	Year End Process: E
Default Cat Tol Pct: N	Year End Account:
Foreign Tvl:	Roll BBA to Base:

Obj Trans **Subcode Edits**

Cat	Type	Low	High	Match
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Cost Ref 1:
Cost Ref 2:

Banking and Finance

Default Bank: 11001	Override: Y	Int. Exempt:
Alternate Banks: *****		Int. Exempt Reason:
State Funds: Y	Appropriated:	Interest Acc:

Summary

Screen 34 in Famis (Base Accounts) and 74 (Support Accounts)

Allows for you to view the summary of any account by month.
You have two options to view information:

Summary by Object code (more specific) and by Budget pool (general - ex. 1100,1700,3000,4000 etc)

Main Menu > FRS > Account > Summary

Account Search | Subcode Search | My Accounts | Attributes | Summary | Open Comm | Transactions | Payroll | Reports | Vouchers

Select an account: or type in an account number: or type in a bank number:

Thru Month: Year Type: SL Display:

Open Commitments

Screen 21 in Famis (Base Accounts) and 61 (Support Accounts)

Select an account: or type in an account number:

Thru Month: Obj: Ref1(PO): Ref4(User): Show Completed: Yes No

ACCOUNT OPEN COMMITMENTS (TOTAL ITEMS: 1)								
Obj Cd	Date	Ref	Ref4	Description	Original	Adjusted	Liquidated	Current
1105	09/01/2010	SAL0001	A031986	SALARY ENCUMBRANCE	\$181,239.00	(\$60,412.92)	\$0.00	\$120,826.08
Grand Total:					\$181,239.00	(\$60,412.92)	\$0.00	\$120,826.08

prev 1 next (Showing page 1 of 1, items 1-1) Total Items: 1
Change page: 1 [Go](#) Page size: 25 [Change](#)

Transactions

Screen 46 and 23 in Famis (63 for support accounts)

Select an account: or type in an account number: or type in a bank number:
 Months: Thru: Subcode: TC: Ref2: Ref4: Transaction Type:

This screen allows for you to review all the transactions that have posted to your account.

Select a specific month or a range of months. You can also search by Subcode (Pool) and/or other References if you know them.

Payroll Screen 771 in Famis

Name	Seq Nbr	Pay Cycle	Cycle Date	Account	S/W Obj	Pct Eft	Voucher	Hrs Worked	S/W/L Amt	Charged Benefit Amt	Status	Pay Prd Beg Date	Pay Prd End Date	
	2	B	01/14/2011	284518-10000	1745	25.00%	0004560	3.19	\$23.91	\$0.00	CO	01/06/2011	01/19/2011	Details
	3	B	01/14/2011	284518-10000	1750	25.00%	0004560	3.31	\$24.02	\$0.00	CO	12/23/2010	01/05/2011	Details
	4	B	01/14/2011	284518-10000	1750	25.00%	0004560	3.31	\$24.02	\$0.00	CO	01/06/2011	01/19/2011	Details
	2	B	01/14/2011	284518-10000	1745	25.00%	0004560	2.94	\$22.03	\$0.00	CO	12/23/2010	01/05/2011	Details
	4	B	01/14/2011	284518-10000	1745	25.00%	0004560	1.38	\$11.35	\$0.00	CO	12/23/2010	01/05/2011	Details
	3	B	01/14/2011	284518-10000	1759	25.00%	0004560	4.06	\$29.45	\$0.00	CO	12/23/2010	01/05/2011	Details
	4	B	01/14/2011	284518-10000	1759	25.00%	0004560	5.06	\$36.70	\$0.00	CO	01/06/2011	01/19/2011	Details

This tab allows for you to view who is getting paid out of what account

Reports Allows you to download PDF and Excel Reports of accounts that you select

Main Menu > FRS > Account > Reports [Send Feedback](#)

[Account Search](#) [Subcode Search](#) [My Accounts](#) [Attributes](#) [Summary](#) [Open Comm](#) [Transactions](#) [Payroll](#) [Reports](#) [Vouchers](#)

Report Name: Account Statement Report Month:

ACTIVE ACCOUNT LIST: DEFAULT ACCOUNT LIST (TOTAL ITEMS: 1)

Account	Sub Dept	Dept	Description	Revenue BBA	Expense Budget	Expense Actual	Expense Encumbrance	Exclude from Bottom Line	Net BBA	Unprotected Available	All
				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>

prev 1 next (Showing page 1 of 1, items 1-1) Total items: 1
 Change page: Go Page size: Change

ACCOUNT SEARCH

Account number: Department: Sub-department:
 Responsible person (last, first): Title:
 Show support accounts: Yes No
 Show deleted accounts: Yes No

Vouchers Type in account number and you can view any voucher that has been created for that account
 Select the voucher number you are searching and you can also download a pdf copy of the document

(Voucher Data Form Report)

Select an account: or type in an account number:
 Dept Ref:

VOUCHER RESULTS (TOTAL ITEMS: 133)

Voucher Lines	Dept Ref	Status	Net Amount	Description	Vendor	Vendor Name	Check Nbr	Check Date	Batch Date
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Common Information Searched:

DCR's Main Menu > FRS > DCR

- [DCR Search](#)
- [DCR Document](#)
- [Create DCR](#)

Searching for Invoices

Main Menu » FRS » Invoices » Invoice Search

to Vendor Invoice Search | Invoice Search | Invoice Header | Line Item Details | Notes | PIPS | PIP Search

Document: Invoice: Active Only: No Yes

Purchasing, L's, R's and Travel

Main Menu » FRS » Purch Documents » Purch Doc Search [Send Feedback](#)

Purch Doc Search | Purch Doc Header | Line Item Details | Notes | Good Faith Effort | Tracking | SoQuest Cross Ref

Class: Document: Account Number: Vendor:

Department: Sub Department: User Ref: All Mail Codes: No Yes

State Requisition: State Order: Buyer: Completed Docs: No Yes

You can approve and recall documents in Canopy but you cannot make any adjustments to them
Any adjustments have to be done in Famis

Receiving

Main Menu » FRS » Receiving » Receiving Search

Receiving Search | Receiving Header | Line Item Details | Notes

Status: Dept: Document: No Items Only: No Yes

Vendors

Main Menu » FRS » Vendors » Vendor Search

Vendor Search | Vendor Detail | Documents by Vendor | Invoices by Vendor | Vouchers by Vendor

Vendor: Search by: Number Name Include Frz/Del: No Yes

Address:

Changing Fiscal Years

Fiscal Year:

[Send Feedback](#)

You can select prior years from the drop box and click "Set CC/FFY" to view information