



Introduction to Canopy

Canopy 101

Do I need this Training

- If you will use the Hummingbird application and the FAMIS mainframe application to create purchase documents, and perform budget entries then No, you will not need this training
- If you are more comfortable with the Mainframe interface or have used it previously you will want to complete the FAMIS Online Intro training.
- If you ONLY view accounting information, approve purchasing documents, create Employee Payroll Actions, Departmental Correction Requests, Departmental Budget Requests or Transfer of Departmental Property documents then **STOP!** You may benefit from using FAMIS, the mainframe application for CANOPY
- Either the Intro to FAMIS or the Intro to Canopy are acceptable.
- You will need active FAMIS Production and FAMIS Training user IDs and passwords these are the same in CANOPY and FAMIS Don't skip the practice activities!

Welcome to FAMIS

- You will move through this training periodically stopping and minimizing your screen so you can do the activities in this training.
- You will need to practice the techniques you are learning. They are essential for taking the classroom training.
- At the end of the training, you will need to take a quiz and you must pass the quiz with a score of 100.
- You will need active FAMIS Production and FAMIS Training user IDs and passwords.
- Don't skip the practice activities!

Welcome to: Introduction to CANOPY 102

- **You will move through this training periodically stopping and minimizing your screen so you can do the activities in this training.**
- **Every so often, you will need to practice the techniques you are learning. They are essential for taking the classroom training.**
- **At the end of the training, you will need to take a quiz and you must pass the quiz with a score of 100.**
- **Be sure you have your user IDs Handy.**
- **Be sure you know your passwords.**
- **Don't skip the practice activities!**

What is FAMIS?

Financial Accounting Management Information System

Plain and simple, **FAMIS is an accounting system.** The Texas A&M campus supports over 1,500 users, all of which have different needs.

The following modules are available in FAMIS: Financial Record System (FRS), Fixed Assets (FFX), Sponsored Research (SPR), and Annual Financial Reporting (AFR).

A module is simply a set of related screens.

Please follow the links to see how how FAMIS might benefit you!

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.**

Financial Record System - FRS

The most commonly used module is the Financial Record System (FRS).

Within FRS are the following modules:



Financial Accounting Module

Departmental and/or Financial Management Operation staff may enter and view budgets, revenues, expenses, and journal entries. FAMIS makes it easy to inquire on account balances, monthly statements, and all transactions that have been posted to a department's account number.

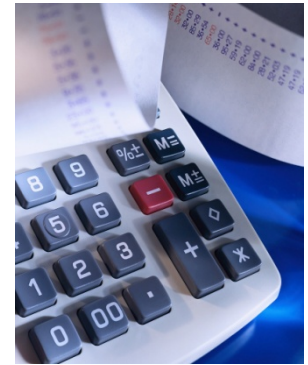
•Accounts Payable Module

FAMIS includes payment inquiry screens which allow you to tell vendors the status of payments for items that your department has purchased.

•Accounts Receivable Module

You would use this module if your department charges entities that are not part of Texas A&M University. These screens offer inquiry for transactions relating to billings and payments for goods or services rendered for Accounts Receivables. For example, the Small Animal Clinic at the College of Veterinary Medicine charges individuals for veterinary services they provide to the community.

FRS - Continued



Purchasing Module

The purchasing module allows departments to electronically create purchasing documents and to electronically route them to the appropriate people for signatures. There are numerous purchasing inquiry screens to help you track the status of your purchases from the initial order and receipt, all the way to the payment.

Payroll Module

The payroll inquiry screens show information relating to payroll expense distribution. Many departments limit payroll inquiry access.

Budget Preparation Module

Departments and Financial Management Operations utilize budget entry and inquiry screens to prepare the annual budget that Texas A&M submits to the Board of Regents.

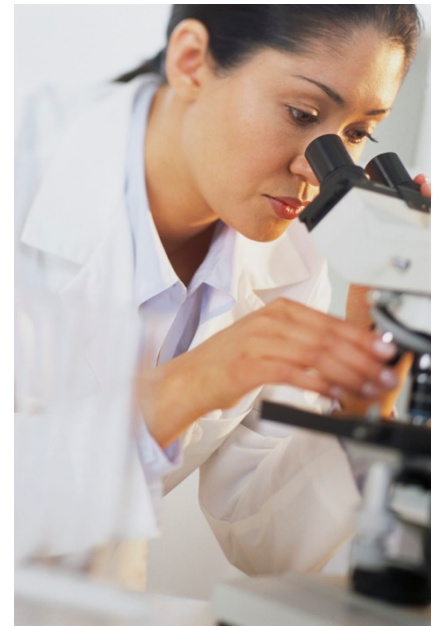
Fixed Asset Module - FFX



The Fixed Asset (FFX) module meets all inventory needs. This module is especially handy for anyone who is responsible for inventory management. In FFX, you can inquire and make changes on asset locations.

Sponsored Research - SPR

The Sponsored Research (SPR) module contains grant and proposal information. Access at Texas A&M to SPR is limited to Contract Administration, Financial Management Operations, and the Vice President for Research staff. SPR is not currently available in CANOPY



Annual Financial Reporting - AFR

The Annual Financial Reporting (AFR) module meets state reporting needs. Only Financial Management Operations receives access to AFR.

AFR is not currently available in CANOPY

Employee Personnel Action - EPA

The EPA Module is housed under CANOPY which is the umbrella web application for Business Computing Services at The Texas A&M University System.

The EPA module utilizes the FAMIS Routing & Approvals for the routing and approvals of these new payroll actions.

The document forms for EPA are:

EBR for Employee Budget Request

EWR for Employee Wage Request

EGR for Employee Graduate Request

CANOPY/FAMIS Access Levels



Your security access level is determined by what your department submitted on the FD-825 FAMIS Access Request Form. Depending on your job, you may need inquiry or update access into CANOPY or FAMIS. When you are given FAMIS Access, you are automatically given access to the CANOPY system. For Texas A&M employees, if you are unsure about what access you will have, then contact FAMIS Security at famis-aid@tamu.edu. If you work for the Ag Program, then contact Ag Program FAMIS Security at (979) 862-2245 or at FAMISHelp-Ag@ag.tamu.edu.

Types of Access

Inquiry Access

Inquiry means view only, so with inquiry access you cannot change any data on a CANOPY screen. If you requested inquiry to the Financial Record System for Texas A&M accounts, then you will receive access to all accounts and all screens except for payroll, unless you ask for them. If you work for the Ag Program your security may be limited. Please contact Ag Program FAMIS Security for what access you will receive.

Update Access

Update access allows you to change data in CANOPY. If you need to enter data into CANOPY, then you will only receive update access to the screens and accounts necessary for you to enter the data. For example, Mary can only create purchasing documents for accounts at Biology.

It will be easy for you to determine if you have update ability to a screen because you will be able to tab all over the screen, and the lines will be a different color from the lines in which you can not update.

**Your access can consist of both inquiry and update.
Thus, you may be able to view some screens, and
make changes to others**

What is the Mentor Program?

The mentor program only applies to Texas A&M and TVMDL employees.

Mentor Program

A mentor is a person who your department assigns to assist you with using FAMIS until you are able to complete all of your training. Not everyone has a mentor. To find out if you have one, email famis-aid@tamu.edu.

*If you have a mentor, then ***Beware of Security Breaches.**** If you have a mentor, then you must use your own UserID and password to perform any inquiries or entries. Your mentor should never utilize your access for anything, nor should you use his/hers. If this does happen, even for training purposes, it is a breach of security, and FAMIS Security will have to take immediate disciplinary action.

How the Mentor Program Works

If you have a mentor, then after you complete this course, FAMIS Security will give you all of the update access that you need to do your job; therefore, you can begin creating purchase documents with your mentor's assistance right away. FAMIS Security will contact you with information on further training and assign you a training deadline. If you want to keep update access, then you must attend all of your required training by your deadline; otherwise Security will remove your update access.

If you do not have a mentor, then Security cannot give you any update access until you have attended your required training.

Training Requirements



You may be required to attend further training to perform all of your FAMIS/CANOPY related job functions. Once FMO Financial Training & Security receives your quiz, then they will contact you concerning further training. If you do not hear from them, then you should call (979) 458-5555 or email famis-aid@tamu.edu.

Security

At TAMU, we take security VERY Seriously. Both your CANOPY and FAMIS password and ID are identical and should be treated with equal care. Security breaches are a zero tolerance issue!

Many people have signature authority and the ability to create, approve or sign payments by logging into FAMIS or CANOPY.



Password and Access Sharing

Password or access sharing is prohibited, no matter what the circumstance (training included).

Password and Access Sharing is against the law (Texas Penal Code, Chapter 33, Title 7). Your CANOPY ID and password is like your signature authority and sharing your access or password is like giving away your signature.

In any instance where access or password sharing occurs, CANOPY Security will take immediate disciplinary action. If you let someone use your access, but you do not tell them your password, then you are still violating security. CANOPY records any changes made using your access under your UserID, so it is very easy for anyone to locate CANOPY entries tied to you for which you will be held responsible.

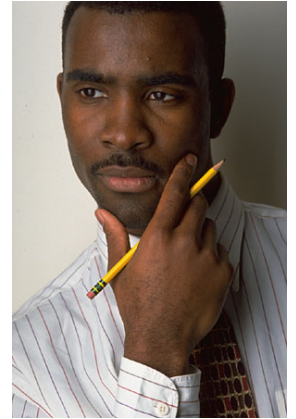
The first time that you log onto CANOPY, and once a year thereafter, you will see a **Statement of Responsibility**. The Statement of Responsibility is an agreement which reminds you of the security policy and the importance of keeping your logon password **secret**. It also reminds you that the information you have access to should only be used for work-related business. To keep your access, you must agree to the Statement of Responsibility; otherwise, Security will have to revoke your access.

Security Rules to Protect Yourself

If you have trouble accessing CANOPY, then you should *always* contact FMO- Financial Training & Security at (979) 458-5555

- **You should be the only person using your CANOPY UserID**, and you should never use anyone else's CANOPY UserID. **NO EXCEPTIONS**. As a rule of thumb, you are the only person who should touch the keyboard when you are logged into CANOPY.
- **Never share your CANOPY password with anyone - not even your boss or assistant. Never write it down and put it where someone could find it. If someone asks you for your password, then he/she is breaching security. Please report such incidents to FAMIS Security immediately.**
- **Always use a secured connection when using CANOPY.** If you have questions as to whether you have a secured connection, please contact your computer support person in your department.

Section Check Point



Can you explain these things?

- How CANOPY access is granted
- The difference between inquiry and entry/update access
- How the mentor program works
- Training requirements
- Why you should not share your password or access
- Ways to protect your I.D. and password

Logging In

You will need your CANOPY Production & CANOPY Training ID numbers (UserIDs) and the temporary passwords. FMO-financial Training & Security will email your CANOPY/FAMIS IDs to you with information on who to call for your temporary passwords once we receive your FD-825 Access Request form. If you did not receive this e-mail call 979-458-5555 for help.



Wait, why do I have two ID's?

The difference between CANOPY Production & CANOPY Training.

CANOPY Training

It is a "play" or test application used to try things out at your office and in the training classes before doing them for real in Production. Your CANOPY Training ID will end in "t," for example, crec02t. Right now, you have access to update screens in Training. If you change anything, don't worry about it. Changes made in training do not

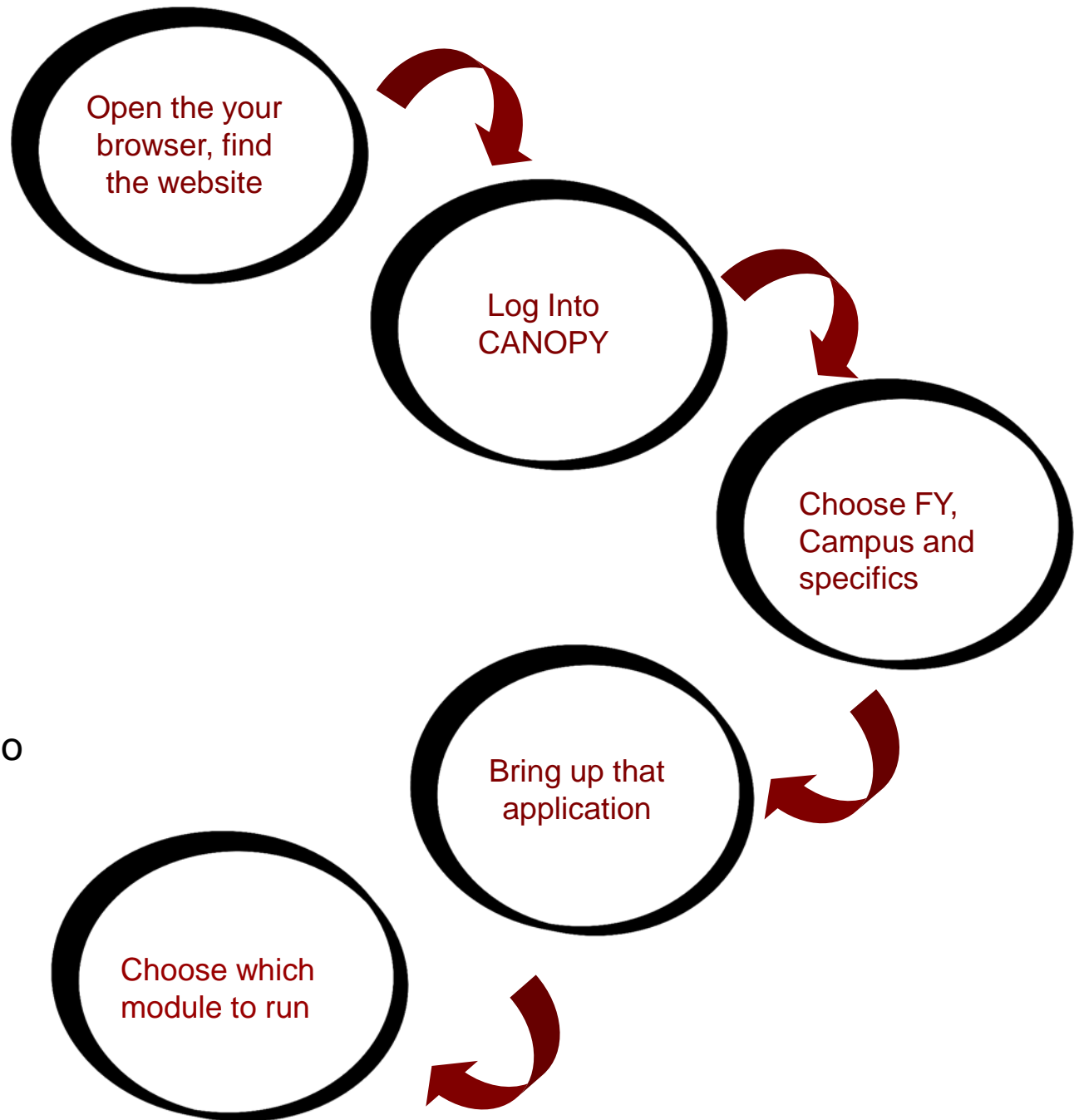
CANOPY Production

It is used for normal day-to-day activities. Your CANOPY Production UserId or "key" will end in a "p," for example, crec02p. If you work for TAMU, then, right now, you have inquiry only access. So, when you log in today, you do not have to worry about changing anything that you shouldn't. If you work for the Ag Program, you are given all the access you requested.

Logging In - Summary

CANOPY Only

This graphic illustrates the logging in process. During this part of the course we will walk you through the procedure step by step. You will notice the steps you will go through logging into CANOPY are quite similar to those you go through when you go into your office building at work.



Let's start the CANOPY activity...

- For each screen where you see a computer screen, Read the instructions.
- Once you have read the instructions, minimize the screen and try the example on your own.
- Once you have done the activity, simply minimize the CANOPY window and expand the online class window and keep working on the next step of the activity or continue with the training.

Let's get Started

- Click on the link below:

<http://www.tamus.edu/offices/famis/canopy/>

- Add this site to your “Favorites” list
- Choose the CANOPY production button

Logging in to CANOPY



Training Version

Canopy Login - The Texas A&M University System

FAMIS User Id: <input type="text"/>	<p>This computer system and data herein are available only for authorized purposes by authorized users. Use for any other purpose may result in administrative/disciplinary actions or criminal prosecution against the user. Usage may be subject to security testing and monitoring. Applicable privacy laws establish the expectations of privacy.</p> <p>For additional information please see: http://cis.tamu.edu/security/tos/</p>
Password: <input type="password"/>	
<input type="button" value="Login"/>	
Change Password	

[Click here for the old version of Canopy](#)

First time logging in, you will need to change your temporary password to a permanent one. Click on the link “Change Password”

Be sure you turn off the pop-up blocker or at least set it to allow pop-ups from this site.



Training Version

Canopy Login - The Texas A&M University System

FAMIS User Id:

Current Password:

New Password:

Confirm New Password:

Change Password

[Cancel Password Change](#)

This computer system and data herein are available only for authorized purposes by authorized users. Use for any other purpose may result in administrative/disciplinary actions or criminal prosecution against the user. Usage may be subject to security testing and monitoring. Applicable privacy laws establish the expectations of privacy.

For additional information please see:
<http://cis.tamu.edu/security/tos/>

[Click here for the old version of Canopy](#)

Enter your training ID
XXXX02T

Enter your temporary password

Type in a new password and enter it in both boxes.

NEVER allow Your Browser application to "remember" your password and ID.

About your passwords...

Passwords are like keys.

- You wouldn't use a skeleton key to secure valuables, You'd use a highly technical complex key, a strong key. Your password should be complex and "Strong" too.
- Don't use your name, or a child's or pet's name, historical dates or personal dates, like a birthday or common words or well known hobby related words.
- It's a good idea to use random numbers and replace several with letters
- Avoid characters, CANOPY is finicky about characters and using them can cause more problems than they solve.

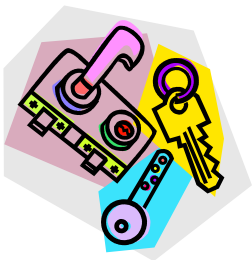
Passwords MUST be EXACTLY 8 characters long

Examples might include:

coffee cup becomes c044ecup

hula hoop =hu1ah00p

slippery = s7i99ery



Locking your screen

Locking your screen is a simple procedure that keeps others from using your CANOPY access when you are away from your desk. You should make locking your screen a habit every time you leave your desk to avoid any security violations from occurring.

Simply type:

Ctrl + ALT + DEL

A windows will open and you should click on the button to Lock your workstation. To unlock your workstation, you will type:

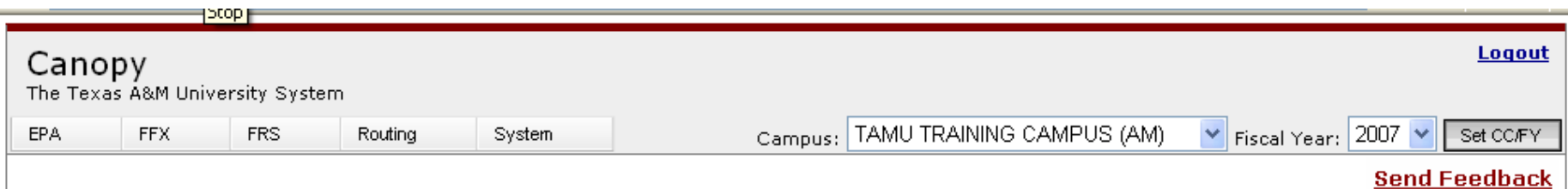
Ctrl + ALT + DEL

And then enter your workstation password. This is the password you use to log in to your computer every morning. Don't know what this is? See your department's IT support for more help.



Screen Features

- There are some common features on each page of this module. This explanation may help you understand the use of some of these features
- 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.
- The logout link allows you to quit your session and logs you out of CANOPY

Screen Features continued

Standard Symbols

Below are some of the standard symbols and their meaning.



Click on this button to expand and show more detail.



Click on this button to collapse and hide detail



This symbol indicates that the items in the column can be sorted in:



Ascending Order



Descending Order



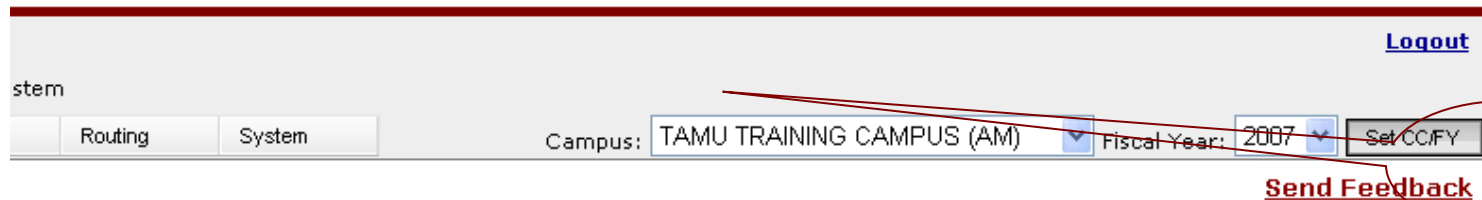
The double arrow buttons allow you to go back to the first record of your search results or to the end of the data.



Logging Off

Logging off is a relatively simple process.

Click the Logout link



1. You will be brought back to the login screen
2. Close your browser window and you are finished.

FAMIS Training

Now that you have successfully mastered logging in and out of CANOPY Production, logging into CANOPY Training will be a breeze for you! Follow the same steps as above, but simply click on the CANOPY – Training button instead.

Remember Training is a "play" or "test" application used to try things out at your office and in any additional FAMIS training classes you might attend. Your CANOPY/FAMIS Training UserID will end in a "t" (i.e. crec02t). You will use the same temporary password you were given by Security. When prompted to enter a new password, be sure to use the same new personal password you used for production.

FMO-Financial Training & Security will be in touch with you concerning further CANOPY Training once you have completed your quiz.

Course Credit

Congratulations! You have made it through **Introduction to CANOPY!** To obtain credit for this class you must be able to:

Master a short 10 question multiple choice, true/false quiz.

- Log completely into CANOPY Production, lock your screen and successfully log off. Keep in mind, we can tell if you did this because the date you logged in will appear on your CANOPY security record.
- Log completely into CANOPY Training, lock your screen and successfully log off. Remember, we can tell if you completed this step!

To take the quiz, simply click on the link

[Quiz](#)