Navigation Menu

- Site navigation through the menus give you access to all pages. Simply mouse-hover over the EPA, FRS, FFX, ... menu to see the submenu.

- Hovering over 'EPA' gives the following submenu:

TABS

Tabs are a secondary navigation tool to help you move between similar data. Therefore, you will see different tab groups 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.

- EPA tabs - Document Page Selected

- Routing tabs - Inbox Selected
Campus and Fiscal Year Selection

- Campus Code and Fiscal Year Selection
  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.

### Feedback Emails

- Send a Message to the Canopy Developers. Feedback emails are intended for you to comment on Canopy itself. What is missing? What can make the site better? If there is a problem that needs immediate assistance please email or call FAMIS Services. Items that are beyond simple fixes and bugs may require change/enhancement approval.
Themes

Change the color scheme by picking a style theme.
Employee Payroll Actions (EPA) Module

The Employee Payroll Action Module (EPA) provides search and inquiry access to the BPP Employees and Positions databases, as well the ability to create and process EPA documents (formerly known as Form 500s).

EPA Search

- The search pages have been consolidated into one page; as such the search input text box now handles several data formats. Depending on the format, the employee records, document records, or active budget (Positions/PINS) can generate results. You may enter one of the following items into the search input field:
  - ADLOC – for example 01-100000 or 01100000
  - PIN – budget or wage formats, examples: S00000 or S800000000
  - Document # - full 7 digits (0123456)
  - Names: Last, First examples:
    - Smith, J
    - Van Der (last name with space)

Recent Searches>

Click on the lightbulb 🕯️ to review the last 10 values used in the search box. Select an entry to search again by that value.
Filter

- Depending on the type of data, the other filters may apply.
  - Check VACANT only
  - Position Type: Budget/Wage/ALL
  - Documents: Active/Completed/Cancelled/ALL

Results

- Search results are now able to sort by Column, useful if you want to sort by title within an Adloc. For example:
  - Results are capped. If you hit the cap, try one of the filters listed above.
    - Type in Adloc, click Search
    - Up to 100 entries found.
    - Click the Title code column
    - Results are sorted by code
- My Documents: Click on this button to review documents you created.

Search for a Position (PIN)

Select the Start EPA/PIN from the Tabs available in the EPA system

If you already have a PIN active in your session, the data for that PIN will be displayed immediately.
If you want to look at a different PIN, perform the following two steps:

- Enter the PIN in the Selected PIN box.
- Press the Search / Apply Button.

Looking at other iterations:

By Default the Canopy system will show you the most recent Iteration. Iterations are sequentially number versions or changes to this position over the course of the fiscal year. To look at another iteration, simply change the "Iteration XX" drop down list.

Looking at other fiscal years:

You may also look at this position as it existed (or exists) in other fiscal years. Simply select the fiscal year in the FY drop down box.

The example below shows PIN M70001, Iteration 01, Fiscal year 2007.

---

Search for an Employee

Select the Search tab (far left) from the Tabs available in the EPA system

To Search the Employees data by name:

- Enter the **name** in format (last, first) -or-
- Enter an **SSN** (use can use dashes format NNNNNNNNN or NNN-NN-NNNN) -or-
- Enter a **UIN** (dashes are okay) -or-
- Filter by Budget, Wage, or All
- Click the "Search" Button
In the example below, the search is for all employees that have a last name of "Dwarf"

If you select the UIN you will be transferred to the "Employee Detail" page. If you select the PIN you will be transferred to the 'Position Detail' page.

<table>
<thead>
<tr>
<th>UIN</th>
<th>SSN</th>
<th>Name</th>
<th>Adloc</th>
<th>Adloc Description</th>
<th>PIN</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>214-00-3317</td>
<td>******567</td>
<td>Dwarf, Bashful A</td>
<td>02-237237</td>
<td>The Gold Mine</td>
<td>M70005</td>
<td>Terminated</td>
</tr>
<tr>
<td>814-00-0674</td>
<td>******234</td>
<td>Dwarf, Grumpy A</td>
<td>02-237237</td>
<td>The Gold Mine</td>
<td>M70002</td>
<td>Active</td>
</tr>
<tr>
<td>914-00-2535</td>
<td>******345</td>
<td>Dwarf, Happy A</td>
<td>02-237237</td>
<td>The Gold Mine</td>
<td>M70003</td>
<td>Active</td>
</tr>
<tr>
<td>114-00-5480</td>
<td>******456</td>
<td>Dwarf, Sleepy A</td>
<td>02-237237</td>
<td>The Gold Mine</td>
<td>M70004</td>
<td>Active</td>
</tr>
<tr>
<td>117-00-5940</td>
<td>******001</td>
<td>Dwarf, Sneezy A</td>
<td>02-237237</td>
<td>The Gold Mine</td>
<td>M70006</td>
<td>Active</td>
</tr>
</tbody>
</table>

Search for a Doc

Select the Search tab (far left) from the Tabs available in the EPA system. Enter a 7-digit EPA document number.

Employee Display

Select the 'Employee Details' Tabs.

If you already have a UIN active in your session, the data for that UIN will be display immediately.

If you want to look at a different Employee, perform the following two steps:

- Enter the UIN (or SSN)
- Click the 'Submit' button

The results for Employee 'Snow White' are shown below.
Looking up a particular PIN

Select the 'Position Detail' Tabs

If you already have a PIN active in your session, the data for that PIN will be displayed immediately.

If you want to look at a different PIN, perform the following two steps:

- Enter the PIN
- Click the 'Submit' button
Looking at other iterations:

By Default the Canopy system will show you the most recent Iteration. Iterations are sequentially number versions or changes to this position over the course of the fiscal year. To look at another iteration, simply change the "Iteration XX" drop down list.

Looking at other fiscal years:

You may also look at this position as it existed (or exists) in other fiscal years. Simply select the fiscal year in the FY drop down box. Shown below is PIN M70001, iteration 01, Fiscal year 2007.
EPA Creation

- 1. Initial action
- 2. Select the document creation type
- 3. Select more Actions and Create

Step 1 - Initial Action

You have two or three initial questions that must be answered before you begin the document.

- **Is this action for a Wage Position or a budgeted position?**
  - Wage Positions pay an hourly rate of pay and are not eligible for benefits. Wage positions have a PIN number that consists of the A&M System work station code and the person Social Security Number (SSN). For example, if the person SSN is 888-77-5555 and they work for TAMU, his or her pin will be M8887755555.
  - Budget Positions can pay a monthly rate, or an hourly rate. Budgeted positions are entitled to TAMUS benefits, provided they meet all other criteria (Percent effort, etc.).

- **Is this a new position, or am I taking action on existing position?**
  - A few hints to make this determination:
    - New positions are positions where the PIN has not yet been created.
    - If the position is a wage position, and the person does not yet work for TAMUS, it will be a new position.
    - New budgets positions will assign a new PIN code.
    - If the position is budget, and vacant - you are taking action on a existing position.

- **If this is an existing position - do I know the PIN number?**
  - If not, use the Search Features of system to find the correct PIN number.

If this is a change to an existing position, make sure the position information is displayed on the page before you proceed.

Once you have the answers to these questions, you are ready to begin.

Step 2 - Select the document creation type:

- Proceed to the ‘Position Display’ tab
• Next to the Create EPA document button is a drop down list of the document create types.
  o 1. Select an Action (description for each just below)
  o 2. Click ‘Create’ button

**New Iteration for this PIN**

- Use when you have an existing position (including vacant) positions and you want to make a change to that position.
- This can include (among other things) hiring someone into a vacant position, promoting someone into a vacant position, terminating someone from an active position and performing a funding change to an existing position.
- Insure you have the position you are performing the action on currently visible.

**New Wage Position**

- Use this type only for wage positions.
- Use when you are hiring someone into a wage position.

**New Budgeted Position**

- Use this type only for budgeted positions.
- Use when you have all appropriate authorization for the new position
- Note - most new hires will fall into one of the first two actions - not this one.

**New Budgeted Position - as copy of this position**

- This position is just like (New Budgeted Position) - it exists only to save you some data entry.
- Instead of starting with a blank form, the form will be filled out from data from a similar position.
The position that is currently visible is *the position like* the position you are creating.

**Step 3 - Select More Actions**

1. Verify or Enter PIN
2. Verify or Select the Fiscal Year
3. Verify or Enter the Correct Workstation. Texas A&M main campus is Workstation M.
4. Select a series of Actions starting with DOCUMENT TYPE

The System will walk you through the different document types. Note that the document types and position actions are different for wage and budget positions. If the actions you see do not make sense, you may have made the wrong selection in step 1.

Click Create
EPA Doc Editing

Step 0 - Change Document type and actions

Ooops wrong actions!! You can change the actions; however, generally, you'll just proceed to the Next Step >> Edit Header

- If you selected the wrong actions, you can 'CANCEL' the edit mode.

- Then select 'Change Type'.

---

EPA Document Information

EPA Document Number: 0006256

Doc F
• You will be presented with the same set of action selectors and your previous values will be displayed. When you are ready click ’Change Document Type’.

![Image of a user interface for creating an EPA document]

**Step 1 - Edit the document header**

Show/Hide the ’Steps Required to update/complete ...’ tree. If you click the ‘+’ or double click the first row (highlighted below) the system will remember your last setting. You may collapse the tree and continue.

![Steps required to update/complete an EPA document (your current step is highlighted)]

The document header are the sections of the EPA that are non repeating (e.g. funding source lines). For the EPA document they are the:

- Document Information
- Position Information
- Occupant Information
- Rate Information

Depending on the actions selected, all fields may not be available. For example, a change name action does not give you access to salary data.

Fill the document out. When you are finished press the Save button as shown below.
### EPA Document Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA Document Number</td>
<td>0005066</td>
</tr>
<tr>
<td>Routing Document Number</td>
<td></td>
</tr>
<tr>
<td>Document Type</td>
<td>Create or Reactivate Position (02)</td>
</tr>
<tr>
<td>Doc Prj</td>
<td></td>
</tr>
<tr>
<td>Doc Status</td>
<td>Re-Opened</td>
</tr>
<tr>
<td>Date Created</td>
<td>06/01/2007 1:44 PM</td>
</tr>
<tr>
<td>Last Updated</td>
<td>06/15/2007 11:47 AM</td>
</tr>
<tr>
<td>Campus</td>
<td>GOLD</td>
</tr>
<tr>
<td>SubCamp</td>
<td>THE GOLD MINE</td>
</tr>
<tr>
<td>Dept/SubDept</td>
<td></td>
</tr>
<tr>
<td>Source Balance Edits Overridden</td>
<td></td>
</tr>
<tr>
<td>Override Budget</td>
<td></td>
</tr>
<tr>
<td>RF Cost Sharing</td>
<td></td>
</tr>
<tr>
<td>TESS Cost Sharing</td>
<td></td>
</tr>
<tr>
<td>Justification/comments</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
</tr>
</tbody>
</table>

### Position Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIN Number</td>
<td>M70003 (Budget)</td>
</tr>
<tr>
<td>Administrative Location</td>
<td>02337237</td>
</tr>
<tr>
<td>Title Code</td>
<td>0705</td>
</tr>
<tr>
<td>Previous Title Code</td>
<td>0705 MAIL CARRIER III</td>
</tr>
<tr>
<td>Annual Term From-To</td>
<td>9/1/2006 - 5/31/2007</td>
</tr>
<tr>
<td>Position Action</td>
<td>Create PIN (CR)</td>
</tr>
<tr>
<td>Annual Term Modification</td>
<td>Normal-No breaks in term</td>
</tr>
<tr>
<td>Annual Term Months</td>
<td>30</td>
</tr>
<tr>
<td>Temporary PIN</td>
<td></td>
</tr>
</tbody>
</table>

### Occupant Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant UIN</td>
<td>114-00-5480</td>
</tr>
<tr>
<td>Occupant SSN</td>
<td>456454545</td>
</tr>
<tr>
<td>From/To Pin</td>
<td></td>
</tr>
<tr>
<td>Occupant Name</td>
<td></td>
</tr>
<tr>
<td>(last name)</td>
<td></td>
</tr>
<tr>
<td>(first name)</td>
<td></td>
</tr>
<tr>
<td>(middle initial)</td>
<td></td>
</tr>
<tr>
<td>Previous Occupant SSN</td>
<td>456-45-6456</td>
</tr>
<tr>
<td>Recommended Occupant Action</td>
<td>Transfer In (TI)</td>
</tr>
<tr>
<td>Employees Location</td>
<td>02337237</td>
</tr>
<tr>
<td>Pay Indicator</td>
<td>Monthly - Full Time budgeted (a)</td>
</tr>
<tr>
<td>Source Control</td>
<td>Normal</td>
</tr>
<tr>
<td>FTE Monthly/Yearly Rate</td>
<td>2500.00</td>
</tr>
<tr>
<td>Previous Monthly/Yearly Rate</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>Salary Action</td>
<td>Blank - none</td>
</tr>
<tr>
<td>Previous Budgeted Sal</td>
<td>$22,500.00</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Normal</td>
</tr>
</tbody>
</table>

### Save & Cancel
### Step 2 - Edit the Source Lines

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0705 - MAIL CARRIER III</td>
<td>09/01/2006 to 05/31/2007</td>
<td>AM - 120001-00000 PRESIDENT'S OFFICE 1515 Sal-Sup-Staff - Clas.</td>
<td>5012</td>
<td>60.00%</td>
<td>S/</td>
<td></td>
<td>$1,500.00 $13,500.00</td>
<td>Edit, Delete</td>
</tr>
<tr>
<td>2</td>
<td>0705 - MAIL CARRIER III</td>
<td>09/01/2006 to 05/31/2007</td>
<td>AM - 120010-00000 STRATEGIC SOURCING 1515 Sal-Sup-Staff - Clas.</td>
<td>5012</td>
<td>40.00%</td>
<td>S/</td>
<td></td>
<td>$1,000.00 $9,000.00</td>
<td>Edit, Delete</td>
</tr>
</tbody>
</table>

**Source Line Functions**

- **Edit** - open the line for changes
- **Replicate** - will copy this line and create a new one. Very useful to split funding between accounts
- **Delete** - remove a line.

### Step 3 - Validate the document and Review Net Funding

- Click Validate
• Investigate any errors or see this successful message!

The document was validated and net funding was generated successfully.

Steps required to update/complete an EPA document (your current step is highlighted)

The document was validated and net funding was generated successfully.

Successful!

• Review the Net Funding lines
• If the document changes the funding requirements for any account in this fiscal year, you will see the net funding section of the document. If there are no changes, you will not see this section. You may override the requirement accounts in this section. If you change the accounts, press the Save Net Funding changes.

Step 4 - Close and Route

Go back to the top. Click the ‘Close’ Button. The EPA document will electronically route through the required departments.
Other Action - Recall and Reopen

Ooops wrong data!! Before the document routes to the Payroll office, you may recall the document out of routing. This action will remove any previous approvals. Once reopened, the document must be validated and closed again.
Other Action - CANCEL

Before an EPA document has completed, it can be cancelled at any time during the process. Simply navigate to the Document Type and Actions section and press the Cancel Button.

- Cancelling the document is a final action.
- No further actions may be taken on a cancelled document.
Instructions for attaching scanned or other documents to the EPA

Adding attachments

You may attach electronic document to the EPA document. These attachments will be stored along with the EPA document and will be viewable by anyone who has rights to view EPA document for your department. Authorized employees in the Central Payroll and business offices will also be able to view these documents.

Step 1. Select an entry from the dropdown.
Step 2. If the list does not have a suitable entry, type in your own.

<table>
<thead>
<tr>
<th>Documents:</th>
<th>Supplement</th>
<th>W-4 Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add new attachment</td>
<td>Name: Type your own name here.</td>
<td>(select one or type in your own)</td>
</tr>
<tr>
<td>File location:</td>
<td></td>
<td>Browse...</td>
</tr>
</tbody>
</table>

Add Attachment

Step 3. Browse for the file to attach and click 'Add Attachment'.
Documents must be in **PDF format, and are currently limited to 500K (1/2 of 1 megabyte)**.

**Deleting attachments**

In EPA edit Mode: simply click the (delete) link. The file will be removed automatically.