

**EPA
EMPLOYEE PAYROLL ACTION**

&

**BPP SYSTEM
ACTIVE BUDGET UPDATE**

**Version 1.3
November 2009**

INTRODUCTION

The purpose of this manual is to assist in understanding the processes available for adding or changing payroll budget actions in the Active Budget for the A&M System. The Active Budget is under the responsibility of the BPP Operations Center. Both the EPA Module (under CANOPY) and the BPP System Active Budget Update Process BPP 3270 application access the same database.

By utilizing the information and guidelines contained in this manual, a user should be able to view, establish, adjust, and cancel payroll actions in the Active Budget for the A&M System.

The FAMIS User Manuals are in a constant state of revision, due to screen updates, changes in procedures, or any one of a multitude of reasons. If you would like to make suggestions or call attention to errors, please contact us at (979) 458-6450, or copy the page with the error, note the correction or suggestion and send it to:

College Station based: FAMIS Services
Texas A&M University System
1144 TAMU
College Station, TX 77843-1144

Non-College Station based: The Texas A&M University System
FAMIS Services
A&M System Building, Suite 2180
200 Technology Way
College Station, TX 77845-3424

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Basic Concepts

BASIC CONCEPTS

CANOPY

CANOPY is a web-based application created and maintained by the Business Computing Services department of The Texas A&M System. This umbrella application houses data from payroll (BPP) and accounting (FAMIS) including the EPA module.

With proper security, payroll information can also be viewed at an account level under the FRS Inquiry Tab. Click on the Payroll Tab to access your account detail. Payroll transactions for an account can also be viewed under the Account Summary and Transaction Tabs.

EPA & BPP System Active Budget Update

Both the EPA module and the BPP System Active Budget generate documents which amend a position in the budget with respect to salaries, wages, occupant, job title, sources of funding and the like. The information from EPA documents posts to fiscal accounts in FAMIS and ultimately updates the budget in the BPP system. While not an exhaustive list, all of the following functions are available:

- Add a new position
- Eliminate a position
- Replace an occupant of a position with another person
- Make a position vacant
- Fill a vacant position
- Increase or decrease the salary or percent effort of a position
- Change the funding accounts on a position

The EPA Module is web-based and housed under CANOPY, an umbrella application for Business Computing Services at the A&M System.

The BPP SYSTEM ACTIVE BUDGET Update Process is a mainframe based application with direct input from the 3270 screens of the BPP System. For complete information on the BPP SYSTEM ACTIVE BUDGET UPDATE Process, please contact BPP at bpphelp@tamu.edu.

CANOPY

There are some common features on each page of CANOPY. This explanation may help you to understand the use of these features.

CANOPY Banner

At the top of each page you will see the following CANOPY banner with the tab choices available:

The screenshot shows the top banner of the CANOPY system. On the left, it says "Canopy" and "The Texas A&M University System". In the top right corner, there is a "Logout" link. Below the header, there are several tabs: "EPA", "FFX", "FRS", "Routing", and "System". To the right of these tabs, there are two dropdown menus: "Campus:" with "SAGO TRAINING CAMPUS (SA)" selected, and "Fiscal Year:" with "2007" selected. To the right of the fiscal year dropdown is a "Set CC/FY" button. In the bottom right corner of the banner area, there is a "Send Feedback" link.

MODULE TABS

Note that the tab choices will change over time as new features are added. Make your selection by clicking on the tab for the desired module: **EPA**, FFX, FRS, Routing and System, etc.

The System tab provides access to your User Profile, Release History of changes to CANOPY, and Site Map links for the CANOPY system.

CAMPUS CODE AND FISCAL YEAR

Towards the right, select the Campus and Fiscal Year from the drop down menus if you wish to change from your default. You **MUST** press the Set CC/FY button to make this change.

SEND FEEDBACK

There is a Send Feedback button for emailing user feedback to the CANOPY programmers, such as what you like about CANOPY, what changes you feel would enhance the program, or to report a problem you encounter when using CANOPY.

NOTE: This feedback link is not to be used for "how to" questions. Those questions should be emailed to famishelp@tamu.edu so that someone from the help desk can assist you.

LOGOUT

To leave your CANOPY session, click on the Logout link in the upper right side of the page.

CANOPY Icons, Symbols & Navigation Tools

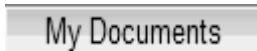
Below are some of the icons, symbols and navigation tools in CANOPY.



Click on the light bulb icon and select from a list of the 10 most recent values used. These values are saved between CANOPY sessions.



Click on the search button to effect the change you made to the filter or search criteria.



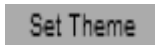
Click to display documents that you have created.



Click on the Calendar icon to select dates from a calendar.



Click on the Download button to extract the data into an Excel spreadsheet.



Click on the Set Theme button to change the background colors and style for your CANOPY sessions.



The BACK button on your browser will return you to your previous page.



Click on an underlined column title to sort by that column.

Selected elements on some pages are links that jump to related data on other pages. For example, Routing and EPA documents can include accounts as part of a line item or source of funds. These accounts have been marked as links which, once clicked, take you directly to the Account Summary page.

1731225 :

Click on a link in the data to display related data.

Details

Click on a highlighted word to link to related data.

Customizing CANOPY

You may select the theme for your CANOPY sessions by selecting a Theme from the Set Theme select box and clicking on the Set Theme button. Each of the available themes has a predefined color scheme and font. The selected theme is saved between logon sessions and until you select a different theme. Available choices may change over time. Some of the current theme choices are: Default (grays and blues), Forrest (muted greens and browns), Neon Blue (bright blue with green highlights) and Dark Red (red highlights).

The screenshot shows the CANOPY interface with the 'EPA Search' section. At the bottom right, a 'Theme:' dropdown menu is open, showing options: Default, Forrest, Neon Blue, and Dark Red. A black arrow points to the 'Forrest' option. The 'Set Theme' button is also visible next to the dropdown.

You may change the color scheme as often as you want. The “Forest Theme” displays information in muted green and brown colors.

The screenshot shows the CANOPY interface with the 'EPA Search' section. The 'Theme:' dropdown menu is open, and 'Forrest' is selected. The 'Set Theme' button is visible next to the dropdown. The interface elements are styled in muted green and brown colors.


ACCESSING CANOPY

To log into **CANOPY**, enter your **FAMIS ID and password** and click on the **Login** button. Your access to CANOPY and the EPA Module within CANOPY is set by your FAMIS security officers. Please contact them if you have difficulty with your login.

CHANGE PASSWORD

You may change your password from the Login screen by clicking on the “Change Password” link.

SAGO Business Computing Services



WEB ENABLED BPP/FAMIS

Canopy Login - The Texas A&M University System

<p>FAMIS User Id: <input style="width: 100%;" type="text"/></p> <p>Password: <input style="width: 100%;" type="password"/></p> <p style="text-align: center;"><input type="button" value="Login"/></p> <p style="text-align: center; font-size: 2em; color: black;">↓</p> <p style="text-align: center;">Change Password</p>	<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> <hr/> <p>For additional information please see: http://cis.tamu.edu/security/tos/</p>
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Enter your FAMIS ID, current password, new password, and retype the new password to confirm, and click on the **Change Password** button to make the change.

Canopy Login - The Texas A&M University System

<p>FAMIS User Id: <input style="width: 100%;" type="text"/></p> <p>Current Password: <input style="width: 100%;" type="password"/></p> <p>New Password: <input style="width: 100%;" type="password"/></p> <p>Confirm New Password: <input style="width: 100%;" type="password"/></p> <p style="text-align: center;"><input type="button" value="Change Password"/></p> <p style="text-align: center;">Cancel Password Change</p>	<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> <hr/> <p>For additional information please see: http://cis.tamu.edu/security/tos/</p>
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Navigation

- As necessary, select the desired **campus code** from the drop down menu.
- Select the desired fiscal year.
- Click on the Set CC/FY button to make the selected campus code and fiscal year your default for your CANOPY sessions.

The screenshot shows the Canopy web application interface. At the top left, it says "Canopy The Texas A&M University System". On the top right, there is a "Logout" link. Below this, there are navigation tabs for "EPA", "FFX", "FRS", "Routing", and "System". The "Campus" dropdown menu is set to "SAGO TRAINING CAMPUS (SA)" and the "Fiscal Year" dropdown is set to "2007". A "Set CC/FY" button is located to the right of the fiscal year dropdown. Below the navigation area, there is a "Send Feedback" link. The main content area is titled "Main Menu" and contains an information box that says "INFO: You have 9 items in your Inbox." Below the information box, there is a list of menu items with expandable arrows: "EPA - Personnel Action Module", "FFX - Fixed Assets Module", "FRS - Financial Reporting Module", "Routing - Document Routing Module", and "System - System Settings and General Information". At the bottom left, there is version information: "Canopy, a Business Computing Services application. The Texas A&M University System Version: 4/23/2007 9:36:08 AM Debug Info". At the bottom right, there is a "Theme" dropdown set to "Default" and a "Set Theme" button, along with a "System - Site Map" link.

NOTE: ALWAYS logout when you are finished.

To logout **either**:

- click on the "Logout" link
- or**
- close the browser window

EPA Module

EPA - Employee Payroll Action System

The EPA System provides for web entry of BPP System Active Budget documents and use of electronic routing and approval of those documents. When closing web-based EPA documents, the encumbrance is created / updated and immediately available for viewing in CANOPY and on the FAMIS screens. EPA documents post encumbrances to FAMIS in an 'on-line real time' basis when all edits are passed and the documents are closed.

Since Active Budgeted position payroll encumbrances post to FAMIS when an EPA document is closed, the EPA document rejects at the time of close if there is not enough budget to support the entry of the document or if there are other problems with the document. Departments can override the budget when they create an EPA document, leaving the payroll workstation and business office to determine if this override is appropriate before allowing it to update the Active Budget in BPP. Payroll workstation / business office personnel are the core of the Payroll Processing Office in Routing & Approvals. It is during the routing of an EPA document that they would review the document for appropriate data.

EPA Module Access

Your access to information in the EPA Module is set by your FAMIS security officer. Depending on your access rights, you may view, modify, and create documents within this module.

CANOPY Routing & Approvals

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 Assistant Request

These forms are important for the correct routing of the documents. The CANOPY Routing & Approvals uses the existing structures built in the FAMIS 3270 screens to route documents.

E-Verify Email

When an EPA is validated it, an email will be generated according to the following rules:

1. An EPA funding source account is marked as e-verify required.

In FAMIS, this SL attribute is on screen 9. For TEES and any NON-FAMIS account, ALL accounts are set as 'E-Verify' required. TTI uses GL accounts, but FAMIS captures the E-Verify flag at the SL. TTI accounts are all set to requiring E-Verify because of this issue. This can be easily

changed.

2. Employee has not already been E-Verified (lookup against the BPP employee attributes)
3. Employee has been E-Verified but the new EPA is for a different workstation.
4. An email address exists on file for that workstation.

If the workstation wishes to receive the emails, they must supply an address. (40 character maximum).

The email template is:

From: noreply@canopy.tamu.edu [mailto:noreply@canopy.tamu.edu]
Sent: Thursday, October 22, 2009 9:41 AM
To: *workstation email address*
Subject: Potential E-Verify Action

Employee: *NAME*

Document: *DOC-ID*

An EPA has been validated which has a potential E-Verify requirement. Please check the document number listed above to confirm this action and proceed with E-Verify if needed.

This is an automated email generated by EPA Validation. Please do not respond to this email. If you need assistance contact FAMIS Help by phone at (979)458-6464 or by [email](#).

IMPORTANT NOTES

- Future year documents can be created once the BPP Prep Budget has been moved to the **Active** Budget for the new fiscal year.
- There is a flag named "Roll to New FY" which only displays and is available between the time when the Prep Budget is rolled to Active and the Beginning of the New Fiscal Year. When payroll changes occur after the budget process, this new flag will automatically copy the new EPA into both years to eliminate double entry. If this flag is set to YES when the EPA reaches BPP, a new iteration will be created in both the current fiscal year and the new fiscal year.
- Results from any search are capped at 1000 records per set.

EPA Search

Search button

Multiple ways to search have been consolidated into one search textbox. This enables you to enter differing pieces of information as input text for your search. Enter one of the following items and click the **Search** button to view the results.

- PIN – budget/wage formats, example: Snnnnn or S8nnnnnnnn
- ADLOC – examples: 01-100000 or 01100000
- UIN – universal identification number
- Names – last, first: example: Smith, J or Van Der
- Document # – full 7 digits; example: 0123456

There are other filters available to refine your searches:

- Position Type -- all, budget only, wage only
- Document Status – all, active, completed, cancelled
- Vacant Only -- show only the vacant positions
- Fiscal Year -- show another fiscal year

Note that the results from any search are capped at 1000 records per set.

My Documents button

Click on this button to review documents you created.



Light Bulb button

Click on the light bulb graphic next to the Search for: input box to view a list of the most recent searches you have made. You may scroll down and select one to advance to the next page for details.

Sorting an EPA Display

You may sort by a column by clicking on the column title.

Canopy
The Texas A&M University System

EPA FFX FRS Routing System Campus: MANGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Get Copy](#)

Main Menu → EPA → Search [Send Feedback](#)

EPA Search

Search for: 02-237237 Fiscal Year: 2007 Vacant Only

Position Type: Budget Only Document Status: All

POSITION RESULTS (Found 22 Records)

Name	PIN	Iter	TI Cd	Title	Adloc	Adloc Description
Dwarf Bashful	M70005	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Dwarf Sleepy	M70004	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Duck Daffy	M33880	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Nature Mother	M33894	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Fudd Elmer	M70010	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Sam Yosemite	M33878	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Mouse Mickey	M33881	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Pig Porkey	M33879	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Jetson George	M33899	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Bell Tinker	M33898	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Cat Sylvester	M33896	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Ogre Shrek	M33900	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Dog Snoopy	M33877	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Cat Tigger	M33897	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Cottontail Peter	M33901	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
White Snow	M70001	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine
Dwarf Grumpy	M70002	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine

Employee Payroll Action Module (EPA)

Search & Column Filters

Using the column filters you can further refine your search to a subset of the data.

Click on the little Filter icon on the right side of the screen to open up small boxes above each column for entry.

Canopy
The Texas A&M University System
Logout

EPA
FFX
FRS
Routing
System

Campus: SAGO TRAINING CAMPUS (SA)
Fiscal Year: 2009
SEARCH

Main Menu
EPA
Search
HELP FEEDBACK

Search
Employee Details
Position Details
Document Details
Create Document

Fiscal Year: 2009

Vacant Only

Position Type: All

Status: All

Search
My Documents

Position Results (Total items: 15)
Filter

Name	PIN	Iter	TI Cd	Title	Adloc	Adloc Description	Active Route Doc
De Sebastian	M35694	01	0110	BUSINESS ASSISTANT I	02-237237	Goldmine	EBRAM0007455
Dwarf, Bashful	M70005	01	3219	PAINTER	02-237237	Goldmine	
Dwarf, Grumpy	M70002	01	0236	EQUIPMENT MANAGER	02-237237	Goldmine	
Dwarf, Happy	M70003	01	4222	POLICE SERGEANT	02-237237	Goldmine	
Dwarf, Sleepy	M70004	01	0705	MAIL CARRIER III	02-237237	Goldmine	
Dwarf, Sneezy	M70006	01	4331	FOOD PROD BOARD MGR	02-237237	Goldmine	
Hendrix, Jimi	M35730	01	0110	BUSINESS ASSISTANT I	02-237237	Goldmine	EBRAM0007520
Hendrix, Jimi	M35732	02	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	EBRAM0007527
Hendrix, Jimi	M35734	02	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	
Hendrix, Jimi	M35736	01	0110	BUSINESS ASSISTANT I	02-237237	Goldmine	
Holly, Buddy, MR	M35735	02	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	EBRAM0007531
Vacant	M35695	03	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	
Valenz, Richie	M35731	02	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	EBRAM0007529
White, Snow	M70001	01	0236	EQUIPMENT MANAGER	02-237237	Goldmine	
Wolfgang, Mozart	M35733	02	0111	BUSINESS ASSISTANT II	02-237237	Goldmine	EBRAM0007528

Document Results (Total items: 154)
Filter

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 5/13/2009 5:15:31 PM [Debug Info](#) [Site Management](#)

[Top of Page](#)

Theme: Neon Blue Set Theme
Turn Paging On
System - Site Map

Search by PIN

Enter a **PIN**. The PIN can be a 6-character budget PIN such as "M85231" or a 10-character Wage PIN such as "M800012345" and click the **Search** button.

NOTE: To further refine your search limit the search to Budget Only or Wage Only positions by selecting the Position **Type** from the drop down list.

Canopy
[Logout](#)

The Texas A&M University System

EPA FFX FRS Routing System

Campus:

Fiscal Year:

[Set Config](#)

Main Menu [EPA](#) [Search](#) [Send Feedback](#)

EPA Search

Search for: Fiscal Year: Vacant Only

Position Type:
Document Status:

Search

POSITION RESULTS (FOUND 1 RECORD)

Name	PIN	Iiter	TI Cd	Title	Adloc	Adloc Description
Dwarf Grumpy	M70002	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine

DOCUMENT RESULTS (FOUND 3 DOCUMENTS)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0005004	EBRAM0005004	Change Salary, Title or Term	Dwarf, Grumpy A	M70002	B	02-237237	THE GOLD MINE	Rejected
0005005	EBRAM0005005	Change Salary, Title or Term	Dwarf, Grumpy A	M70002	B	02-237237	THE GOLD MINE	Cancelled
0005219	EBRAM0005219	Create or Reactivate Position	Dwarf, Grumpy	M70002	B	02-237237	THE GOLD MINE	Cancelled

Search by Adloc

Enter an **Adloc** and click **Search** button.

Canopy
[Logout](#)

The Texas A&M University System

EPA FFX FRS Routing System

Campus:

Fiscal Year:

[Set Config](#)

Main Menu [EPA](#) [Search](#) [Send Feedback](#)

EPA Search

Search for: Fiscal Year: Vacant Only

Position Type:
Document Status:

Search
My Documents

POSITION RESULTS (FOUND 15 RECORDS)

Name	PIN	Iiter	TI Cd	Title	Adloc	Adloc Description
Bunny Bugs	M70007	01	3302	MECHANIC	02-237237	The Gold Mine
Coyote Wile	M70008	01	3232	WELDER	02-237237	The Gold Mine
Dog Snoopy	M33877	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Duck Daffy	M33880	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Dwarf Bashful	M70005	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Dwarf Grumpy	M70002	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine
Dwarf Happy	M70003	01	4222	POLICE SERGEANT	02-237237	The Gold Mine
Dwarf Sleepy	M70004	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Dwarf Sneezzy	M70006	01	4331	FOOD PROD BOARD MGR	02-237237	The Gold Mine
Fudd Elmer	M70010	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Mouse Mickey	M33881	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Pig Porky	M33879	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Runner Road	M70009	01	0705	MAIL CARRIER III	02-237237	The Gold Mine
Sam Yosemite	M33878	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
White Snow	M70001	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine

DOCUMENT RESULTS (FOUND 128 DOCUMENTS)

Search by Employee's UIN or SSN

Enter the employee's full **UIN** or SSN and click the **Search** button.

Canopy Logout
The Texas A&M University System

EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Get ODFY](#)

Main Menu ▾ EPA ▾ Search [Send Feedback](#)

EPA Search

Search for: 114-00-5480 Fiscal Year: 2007 Vacant Only

Position Type: All Document Status: All

EMPLOYEE RESULTS (FOUND 1 EMPLOYEE)

UIN	SSN	Name	Adloc	Adloc Description	PIN	Status
114-00-5480	*****456	Dwarf, Sleepy A	02-237237	The Gold Mine	M70004	Active

POSITION RESULTS (FOUND 1 RECORD)

Name	PIN	Iter	TI Cd	Title	Adloc	Adloc Description
Dwarf Sleepy	M70004	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine

Search by Name

Enter an employee's **name**. Note that the search is not case sensitive.

- You may type just the first letters of the last name; typing "Dwa" returns employees with a last name that begins with "Dwa". Click the **Search** button.

Canopy Logout
The Texas A&M University System

EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Get ODFY](#)

Main Menu ▾ EPA ▾ Search [Send Feedback](#)

EPA Search

Search for: Dwa Fiscal Year: 2007 Vacant Only

Position Type: Budget Only Document Status: All

EMPLOYEE RESULTS (FOUND 5 EMPLOYEES)

UIN	SSN	Name	Adloc	Adloc Description	PIN	Status
214-00-3317	*****567	Dwarf, Bashful A	02-237237	The Gold Mine	M70005	Active
814-00-0674	*****234	Dwarf, Grumpy A	02-237237	The Gold Mine	M70002	Active
914-00-2535	*****345	Dwarf, Happy A	02-237237	The Gold Mine	M70003	Active
114-00-5480	*****456	Dwarf, Sleepy A	02-237237	The Gold Mine	M70004	Active
117-00-5940	*****001	Dwarf, Sneezzy A	02-237237	The Gold Mine	M70006	Active

DOCUMENT RESULTS (FOUND 15 DOCUMENTS)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0005213	EBRAM0005213	Create or Reactivate Position	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005378	EBRAM0005378	Source of Funding Change	Dwarf, Bashful	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005379	EBRAM0005379	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005393	EBRAM0005393	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005394	EBRAM0005394	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005395	EBRAM0005395	Create or Reactivate Position	Dwarf, Bashful	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005424	EBRAM0005424	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	In Routing
0005426	EBRAM0005426	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Open for Editing

- You may also type the person's **last name**. If you enter the entire last name, you may further qualify by adding the first name. You must put a comma between the last name and the first name. Do not enter the first name unless the entire last name is entered.
- Employees with last name **suffixes** (JR, SR, III, etc.) will appear with all other employees with the same last name and sorted in the first name order. Don't use the suffix in the name search.

Results of a Name Search

- The following example displays a name search. This sample search was for all employees that have a last name of "Dwarf".
- Click the UIN number link to select an employee and advance to the "EPA Employee Details" page. This page will display additional detailed information about the employee from the BPP system. You must have proper security to access records further. However, student employee records can be accessed by everyone.

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EPA FFX FRS Routing System
Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set CO/FY](#)

Main Menu [EPA](#) [Search](#)
[Send Feedback](#)

EPA Search

Search for: Dwarf
Fiscal Year: 2007
 Vacant Only

Position Type: All
Document Status: All

EMPLOYEE RESULTS (FOUND 5 EMPLOYEES)

UIN	SSN	Name	Adloc	Adloc Description	PIN	Status
214-00-3317	*****567	Dwarf, Bashful A	02-237237	The Gold Mine	M70005	Active
814-00-0674	*****234	Dwarf, Grumpy A	02-237237	The Gold Mine	M70002	Active
914-00-2535	*****345	Dwarf, Happy A	02-237237	The Gold Mine	M70003	Active
114-00-5480	*****456	Dwarf, Sleepy A	02-237237	The Gold Mine	M70004	Active
117-00-5940	*****001	Dwarf, Sneezzy A	02-237237	The Gold Mine	M70006	Active

DOCUMENT RESULTS (FOUND 15 DOCUMENTS)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0005213	EBRAM0005213	Create or Reactivate Position	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005378	EBRAM0005378	Source of Funding Change	Dwarf, Bashful	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005379	EBRAM0005379	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005393	EBRAM0005393	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005394	EBRAM0005394	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005395	EBRAM0005395	Create or Reactivate Position	Dwarf, Bashful	M70005	B	02-237237	THE GOLD MINE	Cancelled
0005424	EBRAM0005424	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	In Routing
0005426	EBRAM0005426	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Open for Editing

Local intranet
100%

**Employee Payroll Action Module
(EPA)**

Search by Document Number

- Type a document number in the Search for: field
- Click the **Search** button to display the results.
- Click on the column titles to change the sort of the results.
- To view the document details, click on the Doc ID link.

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EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set Org/FY](#)

Main Menu > EPA > Search [Send Feedback](#)

EPA Search

Search for: 0005379 Fiscal Year: 2007 Vacant Only

Position Type: All Document Status: All

DOCUMENT RESULTS (FOUND 1 DOCUMENTS)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0005379	EBRAM0005379	Change Salary, Title or Term	Dwarf, Bashful A	M70005	B	02-237237	THE GOLD MINE	Cancelled

Click on the Doc ID number link to view the document details:

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EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set Org/FY](#)

Main Menu > EPA > Document Details [Send Feedback](#)

EPA Document Details

EPA Document Number: 0005379 Recall Comments (req):

EPA Document Information

EPA Document Number: 0005379 (coversheet)	Doc FY: 2007
Routing Document Number: EBRAM0005379	Doc Status: Cancelled
Document Type: Change Salary, Title or Term (04)	Date Created: 04/09/2007 11:56 AM
Action is Effective From-To: 06/01/2007 - 08/31/2007	Last Updated: 04/09/2007 11:57 AM
Source Balance Edits Overridden: No	
Dept/SubDept:	
Override Budget: No	RF Cost Sharing: No
Replace Prior Iteration(s): No	TEES Cost Sharing: No
Justification/Comments: summer appoint	
Attachments:	

Position Information

PIN Number: M70005 (Budget)	Base/New Iteration: 01/02
Adloc: 02-237237 THE GOLD MINE	
Title Code: 3219 PAINTER	
Previous Title Code: 7200 ASSOCIATE PROFESSOR	
Annual Term From-To: 06/01/2007 - 08/31/2007	Annual Term Modifier:
Position Action: Change Period (CP)	Annual Term Months: 3.0

Position Type -- BPP Budget (Positions) Search

The BPP positions budget database contains the positions that current employees hold. The search methods include:

- By Adloc – in PIN order
- By Adloc – in Occupant name order
- By UIN or SSN
- By the PIN (position) number

The search type is determined by your entry in the Search for: field shown below:

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EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set CO/FY](#)

Main Menu [EPA](#) [Search](#) [Send Feedback](#)

EPA Search

Search for: Fiscal Year: 2007 Vacant Only

Position Type: Budget Only Document Status: All

Press the Search button and your search list will be displayed. You may change the sort of the results by clicking on a column title.

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Main Menu [EPA](#) [Search](#) [Send Feedback](#)

EPA Search

Search for: Fiscal Year: 2007 Vacant Only

Position Type: Budget Only Document Status: All

POSITION RESULTS (FOUND 15 RECORDS)

Name	PIN	Iter	TI Cd	Title	Adloc	Adloc Description
Bunny Bugs	M70007	01	3302	MECHANIC	02-237237	The Gold Mine
Coyote Wile	M70008	01	3232	WELDER	02-237237	The Gold Mine
Dog Snoopy	M33877	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Duck Daffy	M33880	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Dwarf Bashful	M70005	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Dwarf Grumpy	M70002	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine
Dwarf Happy	M70003	01	4222	POLICE SERGEANT	02-237237	The Gold Mine
Dwarf Sleepy	M70004	01	7200	ASSOCIATE PROFESSOR	02-237237	The Gold Mine
Dwarf Sneezzy	M70006	01	4331	FOOD PROD BOARD MGR	02-237237	The Gold Mine
Fudd Elmer	M70010	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
Mouse Mickey	M33881	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Pig Porkey	M33879	02	0111	BUSINESS ASSISTANT II	02-237237	The Gold Mine
Runner Road	M70009	01	0705	MAIL CARRIER III	02-237237	The Gold Mine
Sam Yosemite	M33878	01	0110	BUSINESS ASSISTANT I	02-237237	The Gold Mine
White Snow	M70001	01	0236	EQUIPMENT MANAGER	02-237237	The Gold Mine

DOCUMENT RESULTS (FOUND 128 DOCUMENTS)

BPP Budget (Positions) Search

- Enter the search criteria in the Search for: field.
- Click the **Vacant Only** box to only include vacant positions.
- Select the desired position type and document status from the drop down menus.
- Press the Search button to display the results.
- Click on the column titles to change the sort of the results.

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EPA
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FRS
Routing
System

Campus:

SAGO TRAINING CAMPUS (SA)

Fiscal Year:

2007

[Set CO/FY](#)

Main Menu [EPA](#) [Search](#) [Send Feedback](#)

EPA Search

Search for:

02-237237

Fiscal Year:

2007

 Vacant Only

Position Type:

Budget Only

Document Status:

All

POSITION RESULTS

No results found.

DOCUMENT RESULTS (Found 17 Documents)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0004957	EBRAM0004957	Occupant Change	Vacant,	M33641	B	02-237237	THE GOLD MINE	In Routing
0004954	EBRAM0004954	Occupant Change	Vacant,	M33643	B	02-237237	THE GOLD MINE	In Routing
0004960	EBRAM0004960	Occupant Change	Vacant,	M33644	B	02-237237	THE GOLD MINE	In Routing
0004959	EBRAM0004959	Occupant Change	Vacant,	M33646	B	02-237237	THE GOLD MINE	Completed
0004958	EBRAM0004958	Occupant Change	Vacant,	M33647	B	02-237237	THE GOLD MINE	In Routing
0004956	EBRAM0004956	Occupant Change	Vacant,	M33648	B	02-237237	THE GOLD MINE	Open for Editing
0004955	EBRAM0004955	Occupant Change	Vacant,	M33649	B	02-237237	THE GOLD MINE	In Routing
0005045	EBRAM0005045	Occupant Change	Vacant,	M33798	B	02-237237	THE GOLD MINE	Completed
0005048	EBRAM0005048	Occupant Change	Vacant,	M33798	B	02-237237	THE GOLD MINE	Open for Editing
0005047	EBRAM0005047	Occupant Change	Vacant,	M33799	B	02-237237	THE GOLD MINE	Completed
0005046	EBRAM0005046	Occupant Change	Vacant,	M33801	B	02-237237	THE GOLD MINE	In Routing
0005247	EBRAM0005247	Eliminate Position	Vacant,	M33814	B	02-237237	THE GOLD MINE	Open for Editing
0005417	EBRAM0005417	Occupant Change	Vacant,	M33877	B	02-237237	THE GOLD MINE	In Routing
0005419	EBRAM0005419	Occupant Change	Vacant,	M33879	B	02-237237	THE GOLD MINE	In Routing



Document Search

- Enter a document number in the Search for: field.
- Click the **Search** button to display the results.

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EPA FFX FRS Routing System
Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set Copy](#)

Main Menu > EPA > Search
[Send Feedback](#)

EPA Search

Search for: Fiscal Year: Vacant Only
 Position Type: Document Status:

DOCUMENT RESULTS (FOUND 1 DOCUMENTS)

Doc ID	Route Doc	Type	Name	PIN	B/W	Adloc	Adloc Description	Status
0005219	EBRAM0005219	Create or Reactivate Position	Dwarf, Grumpy	M70002	B	02-237237	THE GOLD MINE	Cancelled

Click on the Doc ID link to view the document details.

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EPA FFX FRS Routing System
Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set Copy](#)

Main Menu > EPA > Document Details
[Send Feedback](#)

EPA Document Details

EPA Document Number: Recall Comments (req):

EPA Document Information

EPA Document Number: 0005219 (coversheet)	Doc FY: 2007
Routing Document Number: EBRAM0005219	Doc Status: Cancelled
Document Type: Create or Reactivate Position (02)	Date Created: 03/08/2007 11:15 AM
Action is Effective From-To: 09/01/2006 - 08/31/2007	Last Updated: 03/08/2007 11:15 AM
Source Balance Edits Overridden: No	
Dept/SubDept:	
Override Budget: No	RF Cost Sharing: No
Replace Prior Iteration(s): No	TEES Cost Sharing: No
Justification/Comments:	
Attachments:	

Position Information

PIN Number: M70002 (Budget)	Base/New Iteration: 01/02
Adloc: 02-237237 THE GOLD MINE	
Title Code: 0236 EQUIPMENT MANAGER	
Previous Title Code: 0236 EQUIPMENT MANAGER	
Annual Term From-To: 09/01/2006 - 08/31/2007	Annual Term Modifier:
Position Action: Reactivate Position (RP)	Annual Term Months: 12.0

Employee Search

- Enter the employee's UIN number.
- Click the **Search** button to display the results.

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EPA FFX FRS Routing System

Campus:

Fiscal Year:

Main Menu > EPA > Employee Details
[Send Feedback](#)

EPA Employee Details

UIN:

Employee Display

Three sections are displayed:

- Employee Information
- Employment Status Information
- Employee Position History for a Fiscal Year

Under the Employee Status Position section:

New fields showing the "Check Dist." (distribution) and "Paid By: (direct deposit or check) have been added.

Under the Employee Position History section:

- Click the PIN link to view the Rate Information, Funding Source details, EPA documents for this PIN, and Position History for the employee.

EPA Position Details

PIN:
Fiscal Year:
Iteration:

Position Information

Pin Number: M70007	Adloc: 02-237237 The Gold Mine
Iteration No: 01	Position Title: 3302 Mechanic
Iteration Status: Cleared (C)	FLSA: Non-exempt (N)
Iteration Effective: 09/01/2006 - 08/31/2007	Term Dates: 09/01/2006 - 08/31/2007
Position Action: Create PIN (CR)	Term Months: 12.0
Prep Date: 04/09/2007	Change No:
Temporary PIN: No	
Action Comments:	

Occupant Information

Occupant Name: BUNNY, BUGS A	From/To PIN:
Occupant UIN: 217-00-3777	Occupant Action: New Hire (NH)
Occupant SSN: 000-13-0002	Occupant Dates: 09/01/2006 -

Rate Information

Percent Effort: 100.00%	Pay Type: Normal
Pay Indicator: Biweekly - Full time budgeted (D)	Budgeted Salary: \$41,760.00
Salary Action: Blank - none	Hourly Rate: \$20.00

POSITION DETAILS

PIN Display/Start EPA Tab

Five sections are displayed:

- Position Information
- Occupant Information
- Rate Information
- Funding Source Lines
- EPA Documents
- Position History

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

To view a different PIN:

- Enter the PIN in the **Selected PIN** box.
- Click the **Submit** button.

The screenshot shows a web form titled "EPA Position Details". It contains several input fields and buttons. On the left, there is a "PIN:" field with the value "M70007". Next to it is a "Fiscal Year:" dropdown menu set to "2007". To the right of that is an "Iteration:" dropdown menu set to "01". Below these fields is a "Submit" button. To the right of the iteration dropdown is a "Create EPA Document" button. Further right is a dropdown menu labeled "New Iteration for PIN" with a downward arrow.

To view other iterations:

By default the CANOPY system will show you the most recent iteration. Iterations are sequentially numbered versions or changes to a position over the course of the fiscal year.

To view another iteration make your selection from the drop down box to the right of the Selected PIN box.

EPA documents show the Base iteration number, as well as the proposed/new iteration. The base iteration will most commonly be the previous iteration number, but in cases where iterations have been withdrawn, or the replace prior iteration flag is used, it will be the last iteration in effect prior to the effective date of this new document.

To view other years:

To view a position as it existed (or exists) in other fiscal years, select the fiscal year from the FY drop down box to the left of the "Search / Apply" button.

Example of PIN M70006, Iteration 01, Fiscal Year 2007

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EPA FFX FRS Routing System

Campus:

Fiscal Year:

Main Menu [EPA](#) [Position Details](#)
[Send Feedback](#)

EPA Position Details

Fiscal Year:

Iteration:

Position Information

Pin Number: M70006	Adloc: 02-237237 The Gold Mine
Iteration No: 01	Position Title: 4331 Food Prod Board Mgr
Iteration Status: Cleared (C)	FLSA: Non-exempt (N)
Iteration Effective: 09/01/2006 - 08/31/2007	Term Dates: 09/01/2006 - 08/31/2007
Position Action: Create PIN (CR)	Term Months: 12.0
Prep Date: 04/09/2007	Change No:
Temporary PIN: No	
Action Comments:	

Occupant Information

Occupant Name: DWARF, SNEEZY A	From/To PIN:
Occupant UIN: 117-00-5940	Occupant Action: New Hire (NH)
Occupant SSN: 000-13-0001	Occupant Dates: 09/01/2006 -

Rate Information

Percent Effort: 100.00%	Pay Type: Normal
Pay Indicator: Biweekly - Full time budgeted (D)	Budgeted Salary: \$41,760.00
Salary Action: Blank - none	Hourly Rate: \$20.00

DOCUMENT DETAILS

Under the EPA Documents section for this PIN:

- Click the Doc ID link to view additional detail about the EPA document.

EPA DOCUMENTS FOR THIS PIN			
Doc ID	Type	Status	Effective Date
0005006	Occupant Change	Rejected	01/30/2007
0005007	Occupant Change	Cancelled	01/30/2007

EPA Document detail information:

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EPA FFX FRS Routing System

Campus:

Fiscal Year:

Main Menu [EPA](#) [Document Details](#)
[Send Feedback](#)

EPA Document Details

EPA Document Number:
Recall Comments (req):

EPA Document Information

EPA Document Number: 0005006 (coversheet)	Doc FY: 2007																				
Routing Document Number: EBRAM0005006	Doc Status: Rejected																				
Document Type: Occupant Change (01)	Date Created: 01/11/2007 11:56 AM																				
Action is Effective From-To: 01/30/2007 - 08/31/2007	Last Updated: 01/11/2007 11:58 AM																				
Source Balance Edits Overridden: No																					
Dept/SubDept:	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Campus</th> <th>Dept</th> <th>SubDept</th> <th>Department Name</th> <th>Electronic Routing</th> </tr> </thead> <tbody> <tr> <td></td> <td>GOLD</td> <td></td> <td>THE GOLD MINE</td> <td>Y</td> </tr> <tr> <td></td> <td>PURS</td> <td></td> <td>PURCHASING SERVICES</td> <td>Y</td> </tr> <tr> <td>AM</td> <td>PRES</td> <td></td> <td>OFFICE OF THE PRESIDENT</td> <td>N</td> </tr> </tbody> </table>	Campus	Dept	SubDept	Department Name	Electronic Routing		GOLD		THE GOLD MINE	Y		PURS		PURCHASING SERVICES	Y	AM	PRES		OFFICE OF THE PRESIDENT	N
Campus	Dept	SubDept	Department Name	Electronic Routing																	
	GOLD		THE GOLD MINE	Y																	
	PURS		PURCHASING SERVICES	Y																	
AM	PRES		OFFICE OF THE PRESIDENT	N																	
Override Budget: No	RF Cost Sharing: No																				
Replace Prior Iteration(s): No	TEES Cost Sharing: No																				
Justification/Comments: termination of Sneazy Dwarf - voluntary																					
Attachments:																					

EPA SEARCH (CONT'D)

EPA Doc Display Tab

Six sections (and three sub-sections) are displayed:

- EPA Document Information

Click on the Routing Document Number link to view details about the document routing

- Routing Notes
 - Routing History
 - Current Location / Approval Pending
 - Dept/Unit Routing Status
 - Document Held By
 - FYI Copy
- Position Information
 - Occupant Information
 - Rate Information
 - Funding Source Lines
 - Net Funding

Example of EPA Routing Document Detail

ROUTING NOTES
 >> Reason rejected on 04/10/07 by JOHNS, SCOTT M:
 clear

DOCUMENT HISTORY

Desk	Fwd Name	Office	Date	Name	Phone	Action
CREATE DSK			1/11/2007 11:58:49 AM	Wallace, Damon W	***Voided**	Submitted
SIGNER DSK		AM-GOLD MINE	3/8/2007 9:53:43 AM	Quirino, Laura I	***Voided**	Signed
SIGNER DSK		AM-PURCHASING	4/10/2007 3:08:04 PM	Johns, Scott M	979-458-6454	Rejected

CURRENT LOCATION

Desk	Fwd Name	Office	Date	Name	Phone	Status
			4/10/2007 3:08:04 PM	Wallace, Damon W	979-845-0967	Rejected to:

DEPT ROUTING

Desk	Fwd Name	Office	Date	Dept. Code	Department Name	Status
		GOLD MINE		AM-GOLD	The Gold Mine	Routing Required
		PURCHASING		AM-PURS	Purchasing Services	Routing Required
		PRES		AM-PRES	Office Of The President	Paper/Manual Routing

DOCUMENT HELD BY
 No results found.

FYI COPY
 No results found.

EPA SEARCH (CONT'D)

EPA Document Update

After searching for a document and seeing the detail screen, click on the EPA Document Number link to access the document for updating.

There are 5 buttons available:

- Submit
- Recall
- Reopen
- Withdraw
- Cancel and Void

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EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 [Set Copy](#)

Main Menu > EPA > Document Details [Send Feedback](#)

EPA Document Details

EPA Document Number: 0005006 Recall Comments (req):

Five sections are displayed for an EPA document:

- Document Type and Action Buttons
- Document Information
- Position Information
- Occupant Information
- Rate Information
- Funding Sources

**Employee Payroll Action Module
(EPA)**

EPA Document Information

EPA Document Number: 0005006 (coversheet) Doc FY: 2007
 Routing Document Number: EBRAM0005006 Doc Status: Rejected
 Document Type: Occupant Change (01) Date Created: 01/11/2007 11:56 AM
 Action is Effective From-To: 01/30/2007 - 08/31/2007 Last Updated: 01/11/2007 11:58 AM
 Source Balance Edits Overridden: No

Dept/SubDept:	Campus	Dept	SubDept	Department Name	Electronic Routing
		GOLD		THE GOLD MINE	Y
		PURS		PURCHASING SERVICES	Y
	AM	PRES		OFFICE OF THE PRESIDENT	N

Override Budget: No RF Cost Sharing: No
 Replace Prior Iteration(s): No TEES Cost Sharing: No
 Justification/Comments: termination of Sneezzy Dwarf - voluntary
 Attachments:

Position Information

PIN Number: M70006 (Budget) Base/New Iteration: 01/02
 Adloc: 02-237237 THE GOLD MINE
 Title Code: 4331 FOOD PROD BOARD MGR
 Previous Title Code: 4331 FOOD PROD BOARD MGR
 Annual Term From-To: 09/01/2006 - 08/31/2007 Annual Term Modifier:
 Position Action: Other Action (OA) Annual Term Months: 12.0
 Assignment Dist/Cnty: Temporary PIN: No

Occupant Information

Occupant UIN: From/To Pin:
 Occupant SSN: 999-99-9999 Occupant Name: Vacant,
 Previous Occupant SSN: 000-13-0001 Previous Occupant Name: Dwarf Sneezzy
 Occupant in Position From-To: 01/30/2007 - Current Occupant Action: Voluntary Terminate (VT)
 Recommended Occupant Action: Vacant (VA) Termination Reason: Resignation/Reasons Unknown (59)
 Employee Location: Check Distribution:

Rate Information

Percent Effort: 100.00% Pay Indicator: Biweekly - Full time budgeted (D)
 Previous Percent Effort: 100.00% Source Control: Normal
 Range/Step Code: /
 FTE Monthly/Hourly Rate: \$20.00 Budgeted Salary: \$41,760.00
 Previous Monthly/Hourly Rate: \$20.00 Previous Budgeted Sal: \$41,760.00
 Salary Action: Blank - none Pay Type: Normal

FUNDING SOURCE LINES

Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eff	MSO/SP Flags	Monthly Pay Bud. Salary
1	4331	09/01/2006 to 08/31/2007	AM - 120001-00000 PRESIDENT'S OFFICE 1515 Sal-Sup-Staff - Clas.	5012		60.00%	S/	\$2,088.00 \$25,056.00
2	4331	09/01/2006 to 08/31/2007	AM - 120010-00000 STRATEGIC SOURCING 1515 Sal-Sup-Staff - Clas.	5012		40.00%	S/	\$1,392.00 \$16,704.00

NET FUNDING

Line	Campus	Source Account	Rqmt/Sav. Account	Type	Annual Net Amount	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt
1	AM	120001-00000-1000 PRESIDENT'S OFFICE	120001-00000-1000 PRESIDENT'S OFFICE	Salary Benefits Longevity	\$0.00	\$0.00 (\$13.31) \$0.00	\$0.00 (\$13.31) \$0.00	\$0.00
2	AM	120010-00000-1000 STRATEGIC SOURCING	120010-00000-1000 STRATEGIC SOURCING	Salary Benefits Longevity	\$0.00	\$0.00 (\$8.87) \$0.00	\$0.00 (\$8.87) \$0.00	\$0.00

DOCUMENT CHANGES IN PAYROLL

No results found.

Creating a New EPA Document

CREATING AND WORKING WITH AN EPA DOCUMENT

Preparation Steps

Step 1 – Create the Document

Set the action

Select the document type, occupant
action, and position action

Click the **Create EPA Document** button

Step 2 – Document Header

Document Information

Add Attachments

Position Information

Occupant Information

Rate Information

Save Changes

Step 3 – Funding Sources

Click Done

Step 4 – Validate

Step 5 – Net Funding

Step 6 – Close the Document

Preparation Steps

If you have questions about fields on the EPA document, check the EPA Glossary at the end of this document or contact your agency payroll workstation.

Click the **PIN Disp/Start EPA** Tab from the Menu Tabs.

You have some initial questions to answer 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 workstation code and the person's 9-digit Social Security Number (SSN) - format Mxxxxxxxx.
 - 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.
 - New budget or wage positions will be assigned a new PIN code.
 - If the position is vacant - you are taking an action on an existing position.
- **If this is an Existing Position - do I know the PIN number?**

If not, you can use the Search Features 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 1 - Create the Document

Set the Action

Next to the Create EPA document button is a drop down list of the possible actions. The following picture shows your choices.

Canopy
The Texas A&M University System

EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2007 Set COPY

Main Menu > EPA > Create Document Send Feedback

EPA Create Document

Create Type: New Wage Position PIN: Fiscal Year: 2007 Workstation:

Document Type: New Wage Position

Recommendation: New Budgeted Position
Copy PIN to Next Fiscal Year

Current Occurrence: New Position - Copy Existing PIN

Position Action: Select...

Create Document

Following is a description of each of these Create Type actions:

New Iteration for this PIN

- Use this type for either budget or wage positions.
- 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.
- Ensure 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.

Select the Document Type

After making the appropriate selection above, you will see the following page: The following picture shows your choices and you choose the document type.

The screenshot shows a web-based form with the following fields and options:

- Create Type:** New Wage Position (dropdown)
- PIN:** (text input)
- Fiscal Year:** 2007 (dropdown)
- Workstation:** (text input)
- Document Type:** Select... (dropdown menu)
- Recommended O:** Select... (dropdown menu)
- Current Occupant:** (text input)
- Position Action:** Change Salary, Title, Term, Percent Effort, or Promote (dropdown menu)
- Create Document:** (button)

The dropdown menu for Document Type is open, showing the following options:

- Select...
- Occupant Change (highlighted)
- Create or Re-activate Position
- Source Funding Change
- Change Salary, Title, Term, Percent Effort, or Promote
- End of Term
- Eliminate Position
- Other Changes

CANOPY system walks 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.

Here is an example of entry for a WAGE Position - Hiring a new employee into a new wage position.

Create Type: New Wage Position PIN: Fiscal Year: 2007 Workstation:

Document Type: Occupant Change

Recommended Occupant Action: Select...
Current Occupant Action: Select...
Position Action: Select...

Create Document

Canopy, a Business Computing Solution
The Texas A&M University System
Version: 4/23/2007 9:36:00 AM

Theme: Default Set Theme

Create Type: New Wage Position PIN: Fiscal Year: 2007 Workstation:

Document Type: Occupant Change

Recommended Occupant Action: New Hire

Current Occupant Action: Select...
Position Action: Select...

Create Document

Canopy, a Business Computing Solution
The Texas A&M University System
Version: 4/23/2007 9:36:00 AM

Theme: Default Set Theme
[System - Site Map](#)

Create Type: New Wage Position PIN: Fiscal Year: 2007 Workstation:

Document Type: Occupant Change

Recommended Occupant Action: New Hire

Current Occupant Action: Already Vacant

Position Action: Select...

Create Document

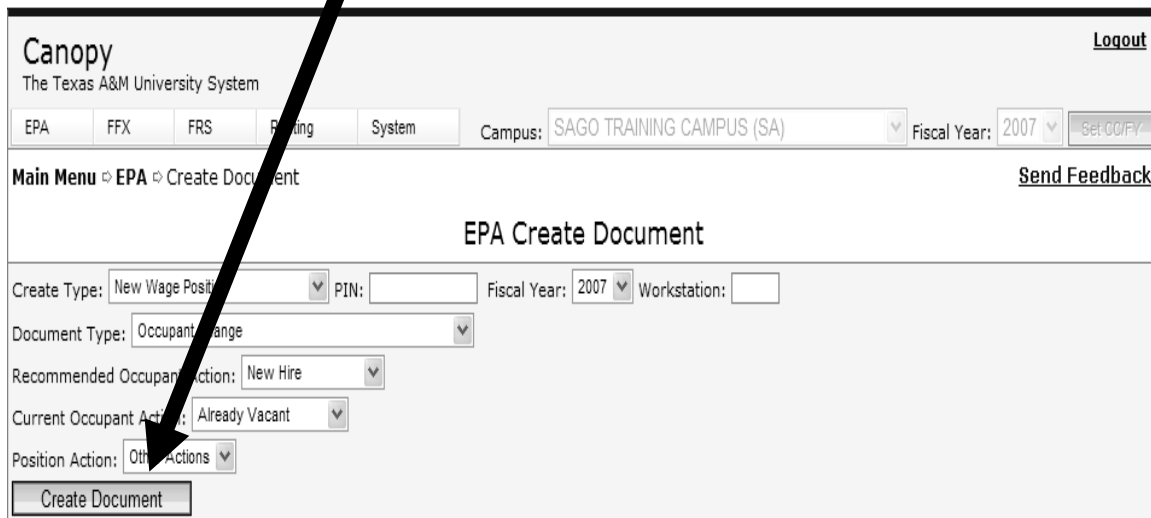
Select the Recommended Occupant Action, Current Occupant Action and Position Action

The drop down lists for the Recommended Occupant Action, Current Occupant Action, and Position Action are different for wage and budget positions. Choose the appropriate action for your situation.

Create the Document

If you are satisfied with what you see - click the **Create Document** button to finalize the create step.

Click the Create Document button



The screenshot shows the 'EPA Create Document' form in the Canopy system. The form includes the following fields and options:

- Canopy** (The Texas A&M University System) and **Logout** link in the top right.
- Navigation tabs: EPA, FFX, FRS, Payroll, System.
- Campus: SAGO TRAINING CAMPUS (SA) (dropdown)
- Fiscal Year: 2007 (dropdown) with a **Set CC/FY** button.
- Main Menu: EPA > Create Document
- Send Feedback** link.
- EPA Create Document** title.
- Create Type: New Wage Position (dropdown)
- PIN: (text input)
- Fiscal Year: 2007 (dropdown)
- Workstation: (text input)
- Document Type: Occupant Change (dropdown)
- Recommended Occupant Action: New Hire (dropdown)
- Current Occupant Action: Already Vacant (dropdown)
- Position Action: Other Actions (dropdown)
- Create Document** button.

Step 2 - Document Header

The document header is comprised of the sections of the EPA that are non-repeating:

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

Document Information

Justification / Comments

The justification comments field accepts 10 lines of up to 74 characters each.

Add 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.

Documents must be in **PDF format, and are currently limited to 1 megabyte).**

Position Information

Annual Term Modifier & Annual Term Months

Annual term months can be modified if the annual term modifier is "D". For all other annual term modifiers, the Annual Term Months will be calculated and replace whatever you enter.

Title Codes and Document Forms

The title codes choices will vary by Member

For example, for TAMUC (cc21)

EWR – Wage Form – All wage pins get set up as EWR

EGR – Grad – Budget pins with title code of 7000 or higher and faculty rank of '0'

EBR – budget – all other budget pins

Grad Assistant and Object Codes

combination of Title Code, Pay Indicator and Object code is not valid

Rules vary by Member

Occupant Information

Rate Information

Wage Positions & Percent Effort

Wage Positions do not have a percent effort as they are only paid for the hours they work.

Save Changes

When you are finished entering, don't forget to click the **Save Changes** button as shown below:

Creating a New EPA Document Employee Payroll Action Module (EPA)

Search	Doc Search	Emp Display	PIN Disp/Start EPA	EPA Doc Display	EPA Doc Update
--------	------------	-------------	--------------------	-----------------	----------------

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

Edit Funding Sources

Document Information

EPA Document Number: 0000386 Doc FY: 2004

Date Created: 02/16/2004 Date Last Updated: 02/16/2004

Document Type: Occupant Change (01) Override Outbalances:

Justification / Comments: This action hires snow white

Position Information

PIN Number: M70001 (Budget) Position Action: Other Action (OA)

AdLoc: 02237237 Adloc Desc: THE GOLD MINE

Title Code: 9516 Title Desc: PRINCESS OF THE FOREST

Effective From-To: 12/01 08/31 Term From-To: 09/01 08/31

Annl. Term Months: 12.0

Occupant Information

Occupant SSN: 999999999 Name(Last/First/MI/Sfx): VACANT

Effective From-To: 09/01/2003 08/31/2004 From/To PIN: /

Recm. Occupant Action: Vacant (VA) Current Occupant Action: Retire (RE)

Rate Information

Percent Effort: 100.00 Pay Indicator: Monthly - Full Time budgeted (A)

Range/Step Code: Source Control: Normal

Monthly FTE/Hourly Rate: 2800.00 Budgeted Salary: \$33,600.00

Salary Action: N/A - No Salary Change (NA) Pay Type: Normal

Funding Sources

Roll to New FY Flag

There is a flag named "Roll to New FY" which is only displayed and available between the time when the Prep Budget is rolled to Active and the Beginning of the New Fiscal Year. When payroll changes occur after the budget process, this new flag will automatically copy the new EPA into both years to eliminate double entry. If this flag is set to YES when the EPA reaches BPP, a new iteration will be created in both the old fiscal year and the new fiscal year.

Step 3 - Funding Sources

Edit funding source lines

Once the document header has been saved, navigate to the funding source part of the document. Click the **Edit Funding Sources** button.

Document Type and Action Buttons

	Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Reset	Occupant Change	Make Vacant	Retire	Other Action

FUNDING SOURCE LINES

Src Effective Dates	Campus	Account	Obj Code	Pct Eff	Acct Analysis	Pgm Code	Title Code	Monthly Pay
09/01/2006 - 05/31/2007	02	<u>120001-00000</u>	1410	60.00%	5012		7200	\$1,320.00
09/01/2006 - 05/31/2007	02	<u>120010-00000</u>	1410	40.00%	5012		7200	\$880.00

Select an account: or type in an account number:

Thru Month: Year Type: FY PY IN SL Display: Summary by Obj. Code Summary by Budget Pool

The funding buttons are:

- **E** - Edit this funding source line
- **R** - Replicate (make copy) of this funding source line
- **D** - Delete this funding source line

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

EPA Doc 0000386 updated successfully.

+ Document Type and Action Buttons

+ Document Information

+ Position Information

+ Occupant Information

+ Rate Information

- Funding Sources

<input checked="" type="button" value="Done"/>	Title Cd	Effective Dates	CC	Account	Acct Anly.	Obj Code	Pgm Cd	Pct Eff	Monthly Pay Bud Sal
<input type="button" value="E"/> <input type="button" value="R"/> <input type="button" value="D"/>	9516 PRINCESS	09/01 - 08/31	AB	237237-00000 THE GOLD MINE ACCOUNT	5012	1510 Sal-Sup-Staff - Prof.		100.00%	\$2,800.00 \$33,600.00

Step 3 - Funding Sources (cont'd)

Make the necessary changes to the funding line(s) and click the **Save** button.

A check box is provided to allow you to specify if funds used on a document are being cost-shared against a TEES project. This box is an information only box, but it will send a copy of the document to the TEES financial system for documentation.

Funding Sources

<input checked="" type="checkbox"/> Done	Title Cd	Effective Dates	CC	Account	Acct Anly.	Obj Code	Pgm Cd	Pct Eff	Monthly Pay	Mgmt/Support Cds
<input type="checkbox"/> Save	9516	09/01 08/31	AB	237237 00000	5012	Sal-Sup-Staff - Prof. (1510)		100.00	\$3,000.00	\$
<input type="checkbox"/> Cancel										

When you have finished with your changes to the funding source(s), click the **Done** button.

Step 4 - Validate the Document

You are now ready to validate the document. Validating the document “crosschecks” the information on the document header and the funding source section.

Click the **Validate** button.

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

Edit Funding Sources

- + Document Information
- + Position Information
- + Occupant Information
- + Rate Information
- + Funding Sources

Step 5 - Net Funding

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 change the requirement accounts as necessary. If you change the accounts, click the **Save Net Funding** button.

The Net Funding display includes calculations for benefits and longevity.

Net Funding edits stop documents from being processed if sufficient budget is not available. There is a field in the Document Information section of the Document Header that can be used to override the budget.

When you are finished, click the **Done** button.

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update HELP ?

EPA Doc validated and Net Funding generated

+ Document Type and Action Buttons

+ Document Information

+ Position Information

+ Occupant Information

+ Rate Information

+ Funding Sources

- Net Funding Amounts

Save Net Funding

✓ Done	Source Account	Rqmt/Sav Account	Obj	Type	Annual Net Amt	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt
TA	113900 07030 1100 Gold Mine Grumpy	113900 07030 Gold Mine Grumpy	1100	Salary Benefits Longevity	\$600.00	\$500.00 \$0.00 \$0.00	\$500.00 \$0.00 \$0.00	\$0.00



If change is positive, the Rqmt/Sav Account field displays the source account, but this account can be overwritten by another account of your choice.

If the change is negative, the Rqmt/Sav Account field is protected and displays the account on FAMIS Screen 8. If the field on FAMIS Screen 8 is blank, then the source account is displayed. To make a change to this account, you must do a Budget Transfer.

Step 6 - Close the Document

The document is now ready to be closed and submitted to Routing & Approvals. The encumbrances post to FAMIS when the EPA document is closed.

Click the **Close** button.

Document Type and Action Buttons

	Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
<input type="button" value="Reset"/>	Occupant Change	Make Vacant	Retire	Other Action

Edit Funding Sources

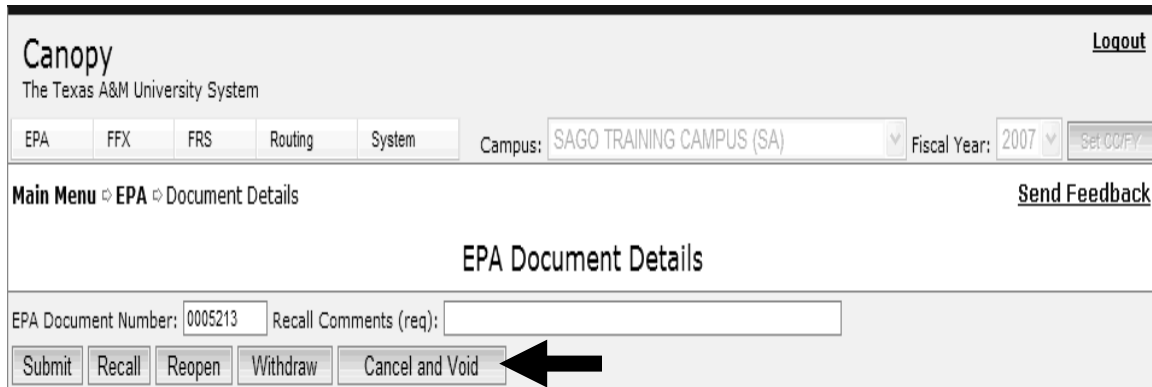
- + Document Information
- + Position Information
- + Occupant Information
- + Rate Information
- + Funding Sources
- + Net Funding Amounts

Cancel or Withdraw An EPA Document

Cancel an EPA Document

An EPA document can be canceled at any time during the process, provided the document has not been submitted.

To cancel an EPA document, click the **Cancel and Void** button.



The screenshot shows the Canopy web interface for EPA Document Details. At the top left, it says "Canopy The Texas A&M University System" with a "Logout" link at the top right. Below this is a navigation bar with tabs for "EPA", "FFX", "FRS", "Routing", and "System". To the right of these tabs are fields for "Campus: SAGO TRAINING CAMPUS (SA)", "Fiscal Year: 2007", and a "Set COPY" button. Below the navigation bar is a breadcrumb trail: "Main Menu > EPA > Document Details" and a "Send Feedback" link. The main heading is "EPA Document Details". Below this is a form with "EPA Document Number: 0005213" and "Recall Comments (req):" followed by an empty text box. At the bottom of the form are five buttons: "Submit", "Recall", "Reopen", "Withdraw", and "Cancel and Void". A large black arrow points to the "Cancel and Void" button.

Withdraw an EPA Document and Iterations

Authorized users in the payroll office see a button on the “EPA Doc Display” page that allows them to withdraw the EPA document.

This action will change the status of the EPA document to “Withdrawn” and also withdraw the iteration from the position in BPP. The iteration prior to the iteration being withdrawn will now become the currently active iteration.

To be given rights to see (and use) the **Withdraw Document** button, you must have FAMIS entity update rights to all documents for your institution, and also must be currently assigned to a final approval desk in the routing path for the payroll office.


It is recommended that this feature be used by the payroll office for all iterations created by the EPA documents.

Printing EPA Documents

Printing an EPA document

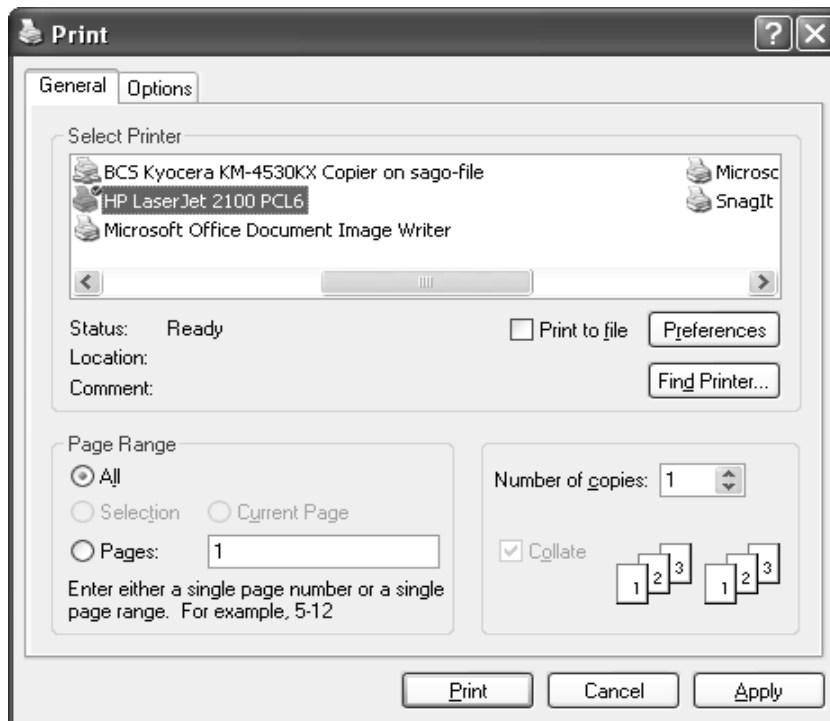
Click on the “Coversheet” link to print a copy. The print dialog box will appear and you may select options before clicking on the Print button.

EPA Document Information

EPA Document Number: [0005213 \(coversheet\)](#)  Doc FY: 2007
Routing Document Number: [EBRAM0005213](#) Doc Status: Cancelled
Document Type: Create or Reactivate Position (02) Date Created: 03/08/2007 10:29 AM
Action is Effective From-To: 09/01/2006 - 05/31/2007 Last Updated: 04/09/2007 11:52 AM
Source Balance Edits Overridden: No

Campus	Dept	SubDept	Department Name	Electronic Routing
	GOLD		THE GOLD MINE	Y
AM	PHYS		PHYSICS	N

Override Budget: No RF Cost Sharing: No
Replace Prior Iteration(s): Yes TEES Cost Sharing: No
Justification/Comments: test
Attachments:



EPA Document Coversheet

EPA Doc Number: 0005213

Doc FY: 2007

PIN Number: M70005 (Budget)

Dept/Sub:	Campus	Dept	SubDept	Department Name	Electronic Routing
		GOLD		THE GOLD MINE	Y
	AM	PHYS		PHYSICS	N

Occupant Name: Dwarf, Bashful A

Adloc: 02-237237 THE GOLD MINE

Title Code: 7200 ASSOCIATE PROFESSOR

If you experience problems printing an EPA document, you may need to make some adjustments to your settings.

Using Internet Explorer, go to FILE, PAGE SETUP.

Set your margins to .25 for both the right and left margins and .5 for your top and bottom margins.

If you still have problems, you can switch the layout of the page to LANDSCAPE.

Routing EPA Documents

EPA documents route through FAMIS Routing & Approvals. EPA documents route through the Routing & Approvals of any TAMUS Member using FAMIS who is impacted by the funding entered on the document.

Discarded notification and FYI actions will not appear by default in your outbox. You may see the discarded items by checking the “Include Discards” box.

General Routing Rules for EPA documents:

- Always routes to the department associated with the ADLOC. This can be seen (displayed only) on screen 861 in FAMIS (go to BPP for changes).
- Budget pins route to departments on the accounts from the ‘Net Funding’ lines.
- Wage pins route to departments associated with each Funding Source line. However, if a source line on the new document was on a prior iteration AND the hourly rate is the same, this is skipped. The account or amount must be different from previous iteration (because there is no net funding.)
- ‘Optional Routing’ section on the EPA Document allows you to add ‘Additional Accounts Routing’; the document will route through the department path for department tied to those accounts.
- Other departments may be added for TEES projects and Research Foundation

TEES – when TEES Cost Sharing on EPA form is checked, the departments of the funding source accounts are included in routing. When it is TEES (cc08) the department listed on the TEES project is used (SCR 861 UP table).

Research Foundation – When a source line has dept ‘RSFN’ or ‘9000’ that department is added to the routing.

Research Foundation – If the TEES project is ‘32526’, document routes to department ‘RSFN’.

Research Foundation – If RF Cost Sharing is checked on the document, department ‘RSFN’ is included in the routing.

**Starting (Creating) a New EPA Document
Employee Payroll Action Module (EPA)**

To see the Routing Document for an EPA document, click on this link.

Canopy [Logout](#)
The Texas A&M University System

EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA) Fiscal Year: 2009 [Set Config](#)

Main Menu > EPA > Document Details [HELP?](#) [Send Feedback](#)

Search Employee Details Position Details Document Details Create Document

EPA Document Number: 0007052 Comments:

[Submit](#) [Recall](#) [Reopen](#) [Withdraw](#) [Cancel and Void](#)

EPA Document Information

EPA Document Number: 0007052 (cov) (at) Doc FY: 2008

Routing Document Number: EBRAM0007052 (Routing Document Report) Doc Status: Completed

Document Type: Create or Reactivate Position (02) Date Created: 07/22/2008 9:06 AM

Action is Effective From-To: 07/03/2008 - 08/31/2008 Last Updated: 07/22/2008 9:20 AM

Dept/SubDept: GOLD

Source Balance Edits Overridden: No Roll to New FY: No

Override Budget: No RF Cost Sharing: No

Replace Prior Iteration(s): No TEES Cost Sharing: No

Justification/Comments: To hire XXX effective 7/3/08 as business assistant I.

Attachments:

Position Information

PIN Number: M35093 (Budget) Base/New Iteration: 00/01

Adloc: 02-237237 GOLDMINE

Title Code: 0110 BUSINESS ASSISTANT I

Previous Title Code:

Annual Term From-To: 09/01/2007 - 08/31/2008 Annual Term Modifier:

Position Action: Create PIN (CR) Annual Term Months: 12.0

Assignment Dist/Cnty: Temporary PIN: No

Occupant Information

Occupant UIN: From/To Pin:

Occupant SSN: *****333 Occupant Name: Dwarf Doc

Previous Occupant SSN:

Previous Occupant Name:

Occupant in Position From-To: 07/03/2008 - Current Occupant Action: Vacant (VA)

Recommended Occupant Action: New Hire (NH) Termination Reason: Blank/None

Employee Location: Check Distribution:

Rate Information

Percent Effort: 100.00% Pay Indicator: Biweekly - Full time budgeted (D)

Previous Percent Effort:

Source Control: Normal

Range/Step Code: /

FTE Monthly/Hourly Rate: \$8.03 Budgeted Salary: \$16,703.00

Previous Monthly/Hourly Rate: \$0.00 Previous Budgeted Sal: \$0.00

Salary Action: Blank - none Pay Type: Normal

Optional Routing

Additional Accts Routing: No Additional Accounts Added Route to "STUDENT" Proc Office: No

FUNDING SOURCE LINES								
Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary
1	0110 - BUSINESS ASST I	09/01/2007 to 08/31/2008	AM - 237237-00000 GOLD MINE DESIGNATED ACCOUNT 1515 Sal-Sup-Staff - Clas.	5012		100.00%	O/	\$1,391.84 \$16,703.00

The 'Optional Routing' selections are displayed here.

Department Routing

The EPA document routes through

- The department of the Adloc of the current position as displayed on the Adloc Table (Screen 306) in BPP.
- The department for each of the Funding Source Accounts
- The department for each of the Requirement Accounts

Optional Routing:

- Under the Optional Routing Section, you have the ability to route EPA documents to 'other' departmental routing based on the entry of an extra account; by entering an account, the EPA document proceeds to the department routing for that account.

Executive Level Routing

The EPA document routes through any Executive Level routing required by the department.

Processing Level Routing

The EPA document chooses its Processing Office path based on one of the following:

- the form (EWR, WBR, EGR)
- Monthly or Biweekly payroll flag (field) stored in BPP. Pay Indicator values of A-C are Monthly, all else is Biweekly
- Adloc Screen 306 in BPP where the path name is stored in a field. You can see this on Screen 861 in FAMIS.
- Student Path is chosen based on two criteria:
 - a. "Route to Student Proc Office" is set to YES on the EPA document
 - b. EPA document uses a student title code

Special Revision Access

Special access to make changes to EPA documents has been granted to persons on desks in the EPA Processing Office. The document must be in the Processing Office and in Open status. You must click the 'REOPEN' tab to open the document.

Canopy
The Texas A&M University System

EPA FFX FRS Routing System Campus: SAGO TRAINING CAMPUS (SA)

Main Menu ▾ EPA ▾ Document Details

Search Employee Details Position Details Document Details Create Document

EPA Document Number: 0007253 Comments:

Submit Recall Reopen Withdraw Cancel and Void

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

- 1 Edit the EPA document.
 - 1.1 Edit the header information and save any changes.
 - 1.2 Edit the individual source lines and save changes for each line.
- 2 Validate the document (this will also generate the net funding).
- 3 Review the net funding and make any necessary changes to the account information.
- 4 Close the document and route it for approval.

Change Type Edit Validate Close

EPA Document Information

EPA Document: 0007253 (EPA Report) (coversheet) Doc FY: 2009

Routing Document: EPA 0007253 Doc Status: Open/Pyrl Office

Document Type: Create or Reactivate Position (02) Date Created: 11/19/2008 10:10 AM

Action is Effective From-To: 01/05/2009 - 01/05/2009 Last Updated: 11/21/2008 10:52 AM

Dept/SubDept: ACCT

Source Balance Edits Overridden: No Roll to New FY: No

Override Budget: No RF Cost Sharing: No

Replace Prior Iteration(s): No TEES Cost Sharing: No

Justification/Comments: This is a test.

Attachments: [Transcript](#)
[W-4 Form](#)
[Work Authorization Certificate](#)

When you open the document, the Section displays that allows you to EDIT a document.

Routing EPA Documents

Routing History is shown on the Routing Document.

The screenshot shows a web browser window titled "Canopy: Routing Document - EBRAM0007852". The address bar shows the URL: https://lab1.system.tamus.edu/Training/canopytwo/Modules/Routing/Document.aspx?routeDocId=EBRAM0007852. The browser interface includes standard menu items (File, Edit, View, Favorites, Tools, Help) and a toolbar with icons for Snagit, Convert, and Select. The main content area is divided into several sections:

- NET FUNDING:** A table with columns: Line, Campus, Source Account, Rqmt/Sav. Account, Type, Annual Net Amount, Iter Eff Date Net Amt, Future Net Amt, and Past/Corr Net Amt. It contains two rows of data for Gold Mine Designated and Grant Accounts.
- DOCUMENT CHANGES IN PAYROLL:** A section with the message "No records found to display."
- ROUTING NOTES:** A section with the message "There are no Routing notes for this document." and an "Add Notes" button.
- DOCUMENT HISTORY:** A table with columns: Desk, Fwd Name, Office, Date, Name, Phone, and Action. It shows one record: CREATE DSK, 9/18/2009 10:45:08 AM, Bayer, Barbara A, 979-845-7212, Submitted.
- CURRENT LOCATION:** A table with columns: Desk, Fwd Name, Office, Date, Name, Phone, and Action. It shows a record for SIGNER DSK at AM-GOLD MINE on 9/18/2009 10:45:08 AM, with a list of names (Mize, Sharon M; Ramirez, Nereida; Castonia, Mary B; Grimes, Daniel E; Quirino, Laura I) and phone numbers. The action is "Approval Pending". A large black arrow points to this section.
- DEPT ROUTING:** A table with columns: Desk, Fwd Name, Office, Dept, Name, and Action. It shows one record: The Gold Mine, AM-GOLD, Currently Routing.
- DOCUMENT HELD BY:** A section with the message "No records found to display."
- FYI COPY:** A section with the message "No records found to display."

At the bottom of the page, there is a footer with the text: "Canopy, a Business Computing Services application. The Texas A&M University System. Version: 9/17/2009 6:01:28 PM Debug Info Site Management". There are also links for "Top of Page", "Theme: Default", "Set Theme", "Turn Paging On", and "System - Site Map". The browser status bar shows "Local intranet" and "100%".

You can see the Current Location of the document as it routes through the paths.

Security & Access Notes

EPA Documents

Your access to information is set by your FAMIS security officer. Depending on your access rights, you may view, modify, and create documents within this module.

Access to EPA on the Web

Entrance to EPA from Home Page

- Must have EPA entity (EPDOC or E***) in FAMIS security

EPA Employee Search

- Access to a person's record from employee search is based on a match between the user's entity security and the adloc/dept of the person they are trying to select.

EPA Position Search

- Access to the record for a position from the position search is based on a match between the user's entity security and the adloc/dept of the position they are trying to access.

Changes to an EPA Document

Budgeted PINs

A person must be granted security rights to create or change documents for an Adloc.

Wage Position

Any department can add sources or drop sources for a Wage PIN. This accommodates the movement of wage employees between Adlocs.

For wage PINs, any person with access to any Adloc in the Workstation of the Wage Position can initiate a change source of funds for a Wage PIN. For example,

Wage PIN M80001244 (John Doe) is Adloc'd to the Library

John Doe takes an evening position with Athletic Department.

The Athletic Department can initiate a change source of funds action on this existing Wage Position.

They cannot, however, view the pay rate on the Library source.

EPA Screens & Entity Control

New Screens

- 755 Summary by PIN -- Display only
- 756 Detail by PIN – Display only
- 757 Summary by SL – Display only
- 758 Detail by SL – Display only

- 753 Budgeted Position Encumbrance Adjustment
- 754 Wage Position Encumbrance Adjustment

Existing Screens

- 770 By Person
- 771 By Account
- 772 Detail Voucher
- 773 By Cycle
- 779 Detail Person Record

Entity Control

- EPDOC
 - Web entry

- EPHIST
 - Inquiry for 755-758 & 770's
- EPENC
 - Update for 753/754
- E*****
 - All entry and inquiry

Active Budget Processing

BPP System

Updating the A&M System Active Budget through the BPP 3270 screens continues to be available. Regardless of input method, BPP System Active Budget Update documents are available and processed each night for all Active Budget updates posted during the business day.

When entries are made directly into the BPP System via the 3270 screens process by payroll workstation personnel, appropriate accounting entries must be created and posted into FAMIS. These BPP entries are generated when the BPP System Active Budget Update is printed and batch fed to FAMIS. This process occurs in the nightly batch processing cycle. The resulting encumbrances and budget transfers are posted later the same night by FAMIS programs FBPU510 and FBPU515. An error report from the FBPU515 is printed that details those transactions that reject. These 'rejects' did not post and need to be addressed.

- FBPU510 is run daily to identify the BPP Active Budget changes. An error report detailing 'PINs with problems' is generated and distributed to the workstation that "owns" the PIN(s) in error.
- FBPU515 is run each night on a Member-by-Member basis, creating the appropriate encumbrance and budget transfer transactions that can be seen on the FRS Payroll Encumbrance, Open Commitment, and Transaction Inquiry screens. An error report details any transactions that reject and must be handled.

Access to the BPP System

Contact bpphelp@tamu.edu for help with acquiring access to the 3270 screens of the BPP System.

Typically, a department prepares an internal hard copy document (a "Request for BPP System Active Budget Update") that is signed by appropriate department personnel. After approval at the departmental level, the document is sent to the A&M System Member's Payroll/Budget Office for entry into the BPP System where the BPP System Active Budget Update is generated.

Active Budget Processing Employee Payroll Action Module (EPA)

For example, a **Form 500T** is used to set up positions and encumbrances at the start of a new fiscal year. A **Form 500R** is used to identify changes to a position from one iteration to another. A Form 500R (iteration status 'S') is required to make changes in FAMIS.

NOTE: A BPP System Active Budget Update must be set to “Print” in BPP in order for data to be sent to FAMIS and show in accounting.

BPP System Active Budget Updates entered into BPP are not fed to FAMIS until the next night, so it usually takes two days for the changes to display on the FAMIS screens.

ITERATIONS: AUDIT TRAIL OF CHANGES

Iterations are sequential change numbers assigned to each Active Budget action for a given position. This iteration number is a 2-digit number that starts at 01 for the fiscal year. The PIN number plus the iteration number is used to identify a unique budget/position action.

A given iteration may be changed several times over several days. Each change to an iteration is not tracked in the BPP system, but may be tracked in the FAMIS BPP System Active Budget Update tracking file if the BPP System Active Budget Update is printed after each change (to be covered in greater detail later).

Each PIN iteration change is assigned a unique change number. The change number is in the upper right corner of the BPP System Active Budget Update and is in the format 999999x - where 999999 is a sequential number and x is the work station code. (See Appendix for Work Station Code Assignments list.)

For EPA documents, the change number is in the format of a 7-digit number (9999999).

BPP SYSTEM ACTIVE BUDGET UPDATE TRACKING IN FAMIS

See the FAMIS Services “Payroll Encumbrance User’s Guide”

**Example of a "Request for BPP System Active Budget Update
Personnel/Budget Action"**

REQUEST FOR FORM 500 PERSONNEL/BUDGET ACTION

SAGO - PR-001
(5-98 REV)

Date: _____ PIN _____ FISCAL YEAR _____

POSITION	ADLOC	EFFECTIVE DATE FROM THRU	ANNUAL TERM DATE FROM THRU	PIN T-CODE	POSITION ACTION *
Current	_____	_____	_____	_____	_____
Recommend	_____	_____	_____	_____	_____

OCCUPANT	NAME	SS NUMBER	EFFECTIVE DATE FROM THRU	FROM PIN	TO PIN	OCCUPANT ACTION **
Current	_____	_____	_____	_____	_____	_____
Recommend	_____	_____	_____	_____	_____	_____

RATE	PERCENT EFFORT	PAY IND	RNG/ STEP	FTE MONTHLY OR HRLY RATE	FTE ANNUAL	SALARY ACTION ***
Current	_____	_____	_____	_____	_____	_____
Recommend	_____	_____	_____	_____	_____	_____

Eligible for Benefit Replacement Pay YES NO Amount _____ (Annual)
Benefit Replacement Pay Included in Above YES NO

SOURCE	REQUESTED RECOMMENDATION									
TITLE CODE	PERIOD FROM THRU	SOURCE PT	ACCOUNT	ACCT. ANALYSIS	OBJ CLASS	PERCENT EFFORT	FUNDING ACCT	SOURCE S-ACCT	BUD	POOL
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

COMMENTS

<p>* Position Action (Both) CP=Change Period CT=Change Title CR=Create EL=Eliminate ET=End of Term RT=Retroactive RA=Reassign Administrator OA=Other Action</p>	<p>** Occupant Action (Current) CN=Change Name DO=Demote Out IT=Involuntary Terminated PW=Promote Within CT=Change Title DW=Demote Within NH=New Hire RE=Retire</p>	<p>** Occupant Action (Recommended) RH=Reappoint VA=Vacant (Budgeted) VT=Voluntary Terminated PO=Promote Out NO=No Occupant (Wage) TO=Transfer Out SL=Start Leave</p>
<p>*** Salary Action (Recommended)</p>		
<p>SC=Source Change ME=Merit Increase</p>	<p>EQ=Equity Increase MA=Mandated Increase</p>	<p>AB=Across Board Inc AD=Admin. Change</p>
		<p>PI=Promotion Increase PP=Pay Plan Adjustment</p>
<p>OA=Other Salary Action</p>		

DEPARTMENT _____ DEPT. HEAD SIGNATURE _____

PHONE NUMBER _____

This form to be used for requests through SAGO Payroll Office Only

Reviewed By:	_____
Human Resources	_____
M/S/O Indicator:	_____
Budgets and Acct.	_____

Active Budget Processing
Employee Payroll Action Module (EPA)

Form 500R

FORM: 500R	PAY TYPE: BUDGET	BUDGET CHANGE? YES ___ NO ___	PAGE 1
ADLOC: CHAIR, DIV ARTS * 5C 16 124000	CHANGE NUMBER: 00356L	DATE PREPARED: 05/25/93	03/047
PIN NUMBER: L00022	FY: 93	PIN TITLE: ASSOCIATE PROFESSOR	
STATUS: SUSPENSE	U.S. CITIZEN?	IF NOT, PERMANENT RESIDENT VISA ?	

POSITION ADLOC	EFFECTIVE DATES FROM TO	ANNUAL TERM DATA FROM TO MOO MTHS	ASSIGNMENT DST	CTY	FIN T - GD	F L	DB S	POSITION ACTION
C 16 124000	12-01 05-31	09-01 05-31 09.0			7200	P	C	
R 16 124000	06-01 08-31	09-01 08-31 12.0			7200	P	S	CHNG PERI

OCCUPANT NAME	VENDOR ID	EFFECTIVE DATES FROM TO	FROM PIN	TO PIN	OCCUPANT ACTION
[REDACTED]	2- [REDACTED] 000	88-08-26			
	2- [REDACTED] 000	88-08-26			

PERCENT EFFORT	P I D	SRC CTL	RMS/STEP	FTE MTH/HR	FTE ANNUAL	AMOUNT CHANGE	PERCENT CHANGE	BUDGETED AMOUNT	RATE ACTION
C 100.00	A			3711.43	33403			33,403	
R 100.00	A			3711.43	44538	0.00	0.00	44,538	

TITLE CODE	PERIOD FROM - THRU	SOURCE PT - ACCT - RJ/PG	ACCOUNTING ANALYSIS	OBJ CLS	PERCENT EFFORT	SOURCE AMOUNT	FUND REQMT
CURRENT							
7200 0901 0531 16 130010		00124 0010	TOTAL	1410	100.00	33,403	\$0.00
						\$33,403	
RECOMMENDED							
7200 0901 0531 16 130010		00124 0010	TOTAL	1410	100.00	33,403	\$5567.16
7200 0601 0831 16 130010		00124 0010		1410	50.00	5,568	\$5567.16
						\$38,971	

*LEGENDS/SOURCE DATA
SOURCE TITLES: 7200 ASSOCIATE PROFESSOR

PT	ACCT	S-ACCT	ACCT NAME	REQMT	PT	ACCT	S-ACCT	DBJ
16	130010	00124	ENGLISH	5567.16	16	130701		110

*COMMENTS - ATTACH ADDITIONAL PAGES AS NECESSARY ELIGIBLE FOR REHIRE? YES NO
JANICE MARYANNE WAS HIRED AS ASST. PROF. FOR SSI AND SSII.

*APPROVALS

DATE	DATE
-----	-----
-----	-----
-----	-----

FORM 500 PERSONNEL/BUDGET ACTION

Glossary

Accounting Analysis Table & Key

The Accounting Analysis Table provides a way to charge benefit related expenses to a different account and/or bank other than that of the source account.

The first 4 digits of accounting analysis field are defined as the key. The accounting analysis key controls posting of the payroll expense and benefits to the correct fiscal accounts and banks. The remaining characters of the key can be defined by the various fiscal offices for their own needs (project accounting, Research Foundation cost sharing, etc.).

Automated Clearing House (ACH)

Automated Clearing House designates the electronic transfer of payroll transactions through the Federal Reserve Banking System. Payment by ACH sends funds directly to the appropriate bank and replaces a paper check.

Accidental Death & Dismemberment (AD&D)

Accidental Death & Dismemberment refers to an optional insurance program offered to employees by TAMUS.

Administrative Location (ADLOC)

Administrative Location -- references the administrator who has budgetary and operational responsibility; individuals whose regular employment falls within the operational scope of a particular area will be identified by the ADLOC of that area. Usually corresponds to the main FAMIS account used by that organizational unit.

Annual Term

This defines the period of time this position will be on the payroll and is found in the Position section of the Document Header.

For typical full-time budgeted positions, these dates are always 9/1/yy through 8/31/yy.

For Teaching and Graduate assistant positions, the term is often different. The person may be employed just for the fall semester (9/1 - 1/15) or just the spring semester (1/16 - 5/31). Any term is valid - provided the term is specified in 1/2 month increments.

Annual Term Modifier

Sometimes the annual term is not continuous. For example, the Term may be from 9/1 to 8/31, but with a break for the first summer session.

If this is the case, the Annual Term modifier is used. See the drop down list in the Position section of the Document Header for the options for the term modifier.

Benefits (see Employer Payments)

Employer payments made on behalf of the employee.

(State) Benefit SLs

Subsidiary Ledgers established for the purpose of holding **State Appropriation Funds** authorized for the payment of employee benefits.

Budgeted Employees

Employees holding a position defined as budgeted because budget is created for that position at the beginning of the employment or fiscal year. These can be employees paid by monthly salary or by an hourly rate.

Deductions - “Deducts”

Employee deductions are funds “withheld from” an employee’s gross pay for various reasons, generally to pay for an employee benefit or obligation that is authorized by the employee or state/federal law. BPP creates accounting entries (equity transfers), checks and/or ACH entries for the employee deductions. This is considered a part of employee gross pay, is paid by the employee and ‘deducted’ from the employee’s pay check.

FAMIS makes no direct entries related to deductions; however, the processing of deductions and payments to benefit vendors is handled in FAMIS.

Effective Date

Indicates the actual date on which the position change being implemented by the EPA document or BPP System Active Budget Update will occur.

Employee Deduction (see Deductions)

EPA / Employee Payroll Action System

The web-based EPA system is available to create or amend a position in the Active Budget with respect to salaries and wages, occupant, job title, source(s) of funding, etc. This is the web based or CANOPY counterpart to the 3270 screen process available in the BPP System.

NOTE: A separate EPA manual is available through the FAMIS website.

Employer Payment/Fringe Benefit

Employer payments or benefits are funds, *over and above an employee’s gross pay*, which are paid to third parties for the benefit of the employee. These employer payments do not impact the employee’s gross pay nor reduce the employee’s net pay. The benefits may or may not be paid by the same account that funds the employee’s gross pay.

Equity Transfers

Funds, or equity, transfers are made between A&M System members to transfer money owed to each other for shared payroll obligations. These transfers resolve, or clear out, the Due to/ Due-from accounts that arise when an employee is paid by more than one A&M System member.

Extended Pay Plan (EPP)

This payroll feature allows an employee on a less than twelve-month contract to be paid over a twelve-month period.

Federal Insurance Contribution Act (FICA)

The employer paid contribution to the Federal Government's Social Security Program.

Federal Income Tax (FIT)

The income tax for the Federal Government deducted from the employee pay.

BPP System Active Budget Update Personnel/Budget Action – (BPP System)

Computer generated document used to amend a position in the budget with respect to salaries and wages, occupant, job title, source(s) of funding, etc. A BPP System Active Budget Update (Form 500T) is produced by the initial load of the budget for the fiscal year. Iteration status is 'C' – Cleared. A BPP System Active Budget Update (Form 500R) is produced by any subsequent changes to the budget. Iteration status is 'S' – Suspense. The Form 500 type (T or R) is determined by the iteration status. The EPA System is the web-based version.

Funding Requirement

Monetary amount required or saved for each source for the time between the effective date of the EPA or BPP System Active Budget Update and the end of the fiscal year. Salary savings are calculated automatically and do not require input to BPP.

Funding Source Lines (see Source Line)

Group Insurance Premiums (GIP)

Group Insurance Premiums, offered to the employees, includes Medical Insurance and Basic Life Insurance. Some programs have wider definitions - and define what part the State contributes to the program. Usually, SGIP refers to employer-paid premiums that can be used for BL, MED, DEN, ADD, VIS or LTD.

Goldplate Budget

This term refers to the finalized 'Prep Budget' following its approval by the Board of Regents.

Gross Pay

The initialized total amount paid to the employee before deductions -- includes salary and wages, but not longevity (which is treated as a negative deduction).

When accounting entries are made in FAMIS to expense payroll to a particular account, the entries are made for the gross pay amount.

Hazard Duty

Hazard Duty is a payment made to employees recognizing length of service in performing work under hazardous conditions and effectively increases their gross pay. In general, hazard duty pay is treated as a type of gross pay. However, it is a separate source item paid under a different, specific object class.

Hourly Employees

Employees that are paid for each hour worked at a predetermined rate of pay. Some are budgeted, others are not.

Iteration

An identifier used to define a specific situation for a defined time period for a position in the BPP Active Budget database. Iteration 01 is the first iteration generated by the initial load of the fiscal year budget.

The BPP system is organized around Positions. However, positions and the people in the positions change over the course of the year.

The first version of the position at the start of the fiscal year is iteration **01**.

Liability Accounts

Accounts, usually General Ledgers, established for the purpose of collecting the monies to be paid to the benefit vendors on behalf of the employees. These accounts are listed on FAMIS Screen 830.

Longevity

Longevity is a payment made to employees recognizing their years of service. This payment effectively increases their gross pay. In BPP, longevity is treated much like a negative deduction; however, in FAMIS, longevity is treated like gross pay and charged to a different expense code.

Net Pay

Net Pay is the amount of pay disbursed to the employee, either through a check or an ACH transaction. The Net Pay is always the gross pay + longevity less the deductions. BPP creates checks and/or ACH disbursements for the amount of the net pay.

Net Pay = Gross Pay + Longevity – Deductions

Old Age Health Insurance (OAH)

The Medicare insurance program is sponsored by the Federal Government. This contribution is paid by the employee.

Old Age Survivors Insurance (OASI)

The Social Security program is sponsored by the Federal Government. This contribution is paid by the employee.

Optional Retirement Program (ORP)

Contributions in the optional TAMUS retirement program are open to specific categories of employees, which includes contributions by the employee (deduction) and the employer (employer-paid benefit).

Pay Cycle Date

The date that identifies the day the employee was paid.

Pay Period End Date

This date marks the end of the period for which the employee is being compensated.

Pay Type

Pay Type defines the processing required by the payroll calculation program to compute the net pay for the pay items.

Personal Identification Number (PIN)

Position Identification Number – a number given to each budgeted position of employment within TAMUS.

Requirement/Savings Account

Account identifies the funding source from which the requirement is being taken or into which the savings is being placed.

Salary Employees

Salary employees are compensated according to an agreed amount based on a payroll period.

Salary Encumbrance

An encumbrance posted at the beginning of the employment or fiscal year to reserve the payroll dollars for the employee.

Salary Savings

Process performed on the last working day of the month that calculates and distributes salary budget not spent during the month due to a position being vacant at least one day during the month. (FBPR050 & FBPR051)

Source Amount

Total dollar amount which is obligated to be paid by the fiscal source over the source period.

Source Line

The funding source line(s) or records(s) specifies how positions are funded. They specify the account that will pay the salary and the object code that will be charged on the account.

The source line is a record associated with a given PIN and iteration that identifies funding information for the PIN. It includes the source account (SL-SA which will be charged), source object code, source accounting analysis, source percent effort, source amount (see above), source requirement account, and the source begin and end period dates.

Tax Deferred Annuity (TDA)

An optional program for employees to deposits funds into an account on a tax deferred basis. Generally this is intended to be part of a retirement program. The funds are deducted from the employee gross pay.

Teachers Retirement System (TRS)

The retirement system sponsored by the State of Texas for employees of Higher Education institutions not participating in ORP. These contributions are paid both by employee deduction and employer-paid benefit.

Unemployment Compensation Insurance (UCI)

Unemployment Compensation Insurance is a program administered by the State of Texas. All claims are initially paid by the State. However, if the employee is paid from local funds, each A&M System member must reimburse the State for the claim. The A&M System is considered a self insured program for this benefit.

Wage Employees

Wage employees are not budgeted positions and are paid by the hour. Wage PINs are assigned by the system as a sequential number. Wage positions can contain different occupants over time.

Workers Compensation Insurance (WCI)

Workers Compensation Insurance is a program coordinated by A&M System. TAMUS is self-insured (through SO) and all claims are a cost to TAMUS (SO), regardless of funding source. WCI is an assessment from SO to each A&M System member.

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