

CANOPY Logon and Navigation

Welcome to CANOPY logon and navigation. To begin, enter your FAMIS UserID and password. If you do not have one, please contact your FAMIS security officers at your agency.

You can also change your password using the “Change Password” link. To do so, enter your current password, then enter a new password and then confirm the new password. Click on the “Change Password” button to make the change. If you do not know your current password, you need to contact your security officers to have it reset.

After logging in, you see across the top of the main menu there are tabs that show the modules available. You also see the modules as links on the left side. I’m going to click on the FRS tab, then select the “Account Search” to show you how to use that page. If I click on word “Canopy” in the upper left corner of the page, it takes me back to the main menu.

The “Recently Visited” area displays the places you have gone to recently. You will see “Account Search” displayed since we just visited that, and also shows that we were in the “Financial Reporting Module”.

The “What’s New” area will give you a quick look at current information out there, announcements, and functionality. We are hoping this will keep you up-to-date with what is available in CANOPY.

The “Campus” selection box provides a drop down list of campuses that you have access to. Click on the campus you desire to select it, if you have multiple campuses listed.

The “Fiscal Year” selection box works similarly, so you would select the year you wish displayed or work with, assuming it is open.

Whenever you change the campus or fiscal year, you must click the “Set CC/FY” button in order for that to take effect.

On the bottom right of the screen is the “Theme” selection box. We are currently using the Large Font because it is best for display purposes; however you can change the theme by selecting one from the drop down list and then click on the “Set Theme” button. This will change the look and feel to your CANOPY experience. Your choice will stay with you until your reset it again, even if you log off and log back on.

There is a “User Profile” (located under the System tab). That user profile is available to you to set some information about the preferences in using CANOPY. The first section has the user profile with your address. The main thing to check in this section is your email address, as that is the email address we will use in the routing notifications.

The “Routing Notification Profile” section has separate settings for the EPA system versus the Purchasing and other non-EPA type documents. The choices are there and you may edit what is shown by clicking on the “Edit” button. This allows you to make changes to your choices, if you want to do so. The most recent addition under Purchasing is the “Voided Approvals”. If you check “Yes”, you will receive email notification if your approval is voided by a recall, cancel or reject. After making changes, click the “Save” button.

The bottom section shows the “CANOPY System Profile Setting”. The most important choice is “Paging On”. When you are dealing with a large display of data it may take up one or more pages in CANOPY. This allows you to go from page to page. The other settings available allow you to select the page size, inbox page size for routing. By setting the “Paging Off”, you can scroll through your data using your browser’s scroll bar going up and down through one long page of data instead of going from page to page.

Click on the word CANOPY in the upper left corner to go back to the main again. There is a “Send Feedback” link in the upper right corner of the page. We ask that you use that to report any difficulties or problems you might have, or if there is something you would like, we would also like to hear that. We would also like to hear the good things about CANOPY. You can submit the feedback anonymously; however, we do ask that you think about that because there have been times when people will submit an idea or something they don’t like but because it was sent anonymously we have no way to get back in touch with them to see if we can make it better. So if you would like a reply from us, be sure to click the “Submit” button rather than the “Submit Anonymously” button.

To log out, click on the “Logout” link in the upper right corner and you will exit the CANOPY session.

We hope this has been helpful to get a first experience using CANOPY, and please remember to use the feedback to give us information regarding your experiences. Thank you.