



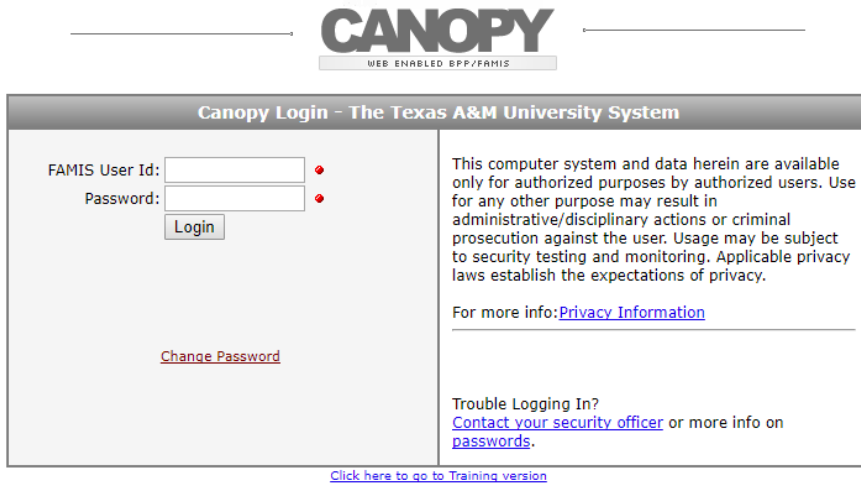
PCT

PAYROLL COST TRANSFER



WHAT IS A PCT AND WHY IS IT BENEFICIAL?

A PCT, Payroll Cost Transfer, is an electronic payroll correction processed in Canopy.



CANOPY
WEB ENABLED BPP/FAMIS

Canopy Login - The Texas A&M University System

FAMIS User Id:

Password:

Login

[Change Password](#)

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

For more info: [Privacy Information](#)

Trouble Logging In? [Contact your security officer](#) or more info on [passwords](#).

[Click here to go to Training version](#)

- Departments handle data entry to ensure accuracy.
- No paper! The complete process, from initiating the document to routing it for approvals, is all completed in Canopy, a web-based program.
- No more waiting 6 – 8 weeks for a payroll correction to process! PCT documents are posted in FAMIS as soon as they have completed final routing.
- Benefits are calculated prior to submission, so you can see a more accurate summation of monies being moved.
- Produces more accurate and on-time Sponsored Bills

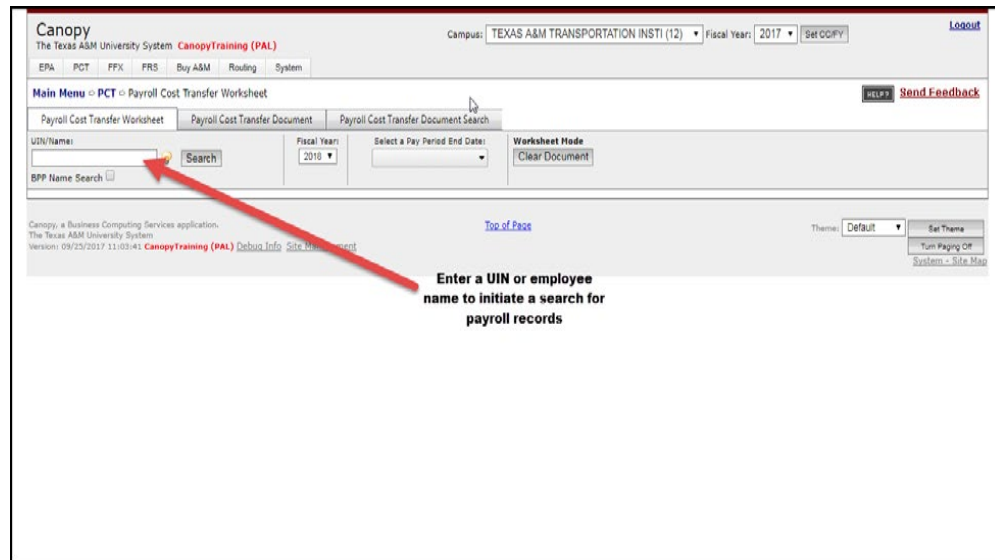
PCT: CREATION

- Log into Canopy
- Choose Payroll Cost Transfer from the Payroll tab menu
- Choose Payroll Cost Transfer Worksheet to begin

The screenshot displays the Canopy web application interface. At the top, the browser address bar shows the URL <https://canopy.tamusc.edu/Default.aspx>. The application header includes the text "Canopy The Texas A&M University System" and navigation tabs for "Payroll", "FFX", "FRS", "Buy ASM", "Routing", and "System". The "Payroll" tab is active, and a dropdown menu is open, showing options: "Payroll Inquiry", "Payroll Cost Transfer", "Net Funding Calc", "Legacy EPA", and "Account Analysis Table". The "Payroll Cost Transfer" option is selected, and its sub-menu is visible, containing "PCT Worksheet", "PCT Document", and "PCT Doc Search". A red arrow points to the "PCT Worksheet" option. The main content area is divided into three columns: "Available Modules" (listing Payroll, FFX, FRS, Routing, and System), "Recently Visited" (listing Payroll Cost Transfer Worksheet, Routing Document, Routing Inbox, and Net Funding Search), and "What's New" (listing Preliminary Assets, Asset Transfer, Enhanced Journal Corrections, and Inbox/Outbox). The footer contains version information and a "Top of Page" link.

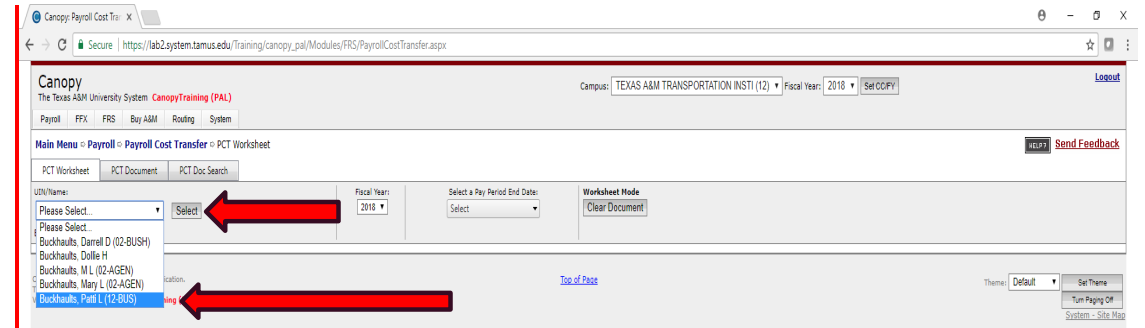
PCT: CREATION (CONTINUED)

- Next, enter a UIN or employee name to search for posted payroll records.



The screenshot shows the Canopy payroll system interface. At the top, it displays "Canopy The Texas A&M University System CanopyTraining (PAL)" and "Campus: TEXAS A&M TRANSPORTATION INSTI (12) Fiscal Year: 2017". Below this is a navigation menu with "Main Menu" and "PCT" selected. The main content area has tabs for "Payroll Cost Transfer Worksheet", "Payroll Cost Transfer Document", and "Payroll Cost Transfer Document Search". The "Payroll Cost Transfer Worksheet" tab is active, showing a form with fields for "UIN/Name:" (with a "Search" button), "BPP Name Search", "Fiscal Year:" (set to 2018), "Select a Pay Period End Date:", and "Worksheet Mode" (with a "Clear Document" button). A red arrow points to the "Search" button. Below the form, there is a text box that says "Enter a UIN or employee name to initiate a search for payroll records".

- If entering an employee name, you may have multiple to choose from. Choose the correct employee from the dropdown, and then click on Select.



The screenshot shows the Canopy payroll system interface with a dropdown menu open. The dropdown menu lists several employees: "Please Select...", "Please Select...", "Buchhauls, Darrel D (02-BUSH)", "Buchhauls, Delle H", "Buchhauls, M L (02-AGEN)", "Buchhauls, Mary L (02-AGEN)", and "Buchhauls, Paul L (12-BUS)". A red arrow points to the "Select" button next to the dropdown. Another red arrow points to the "Buchhauls, Paul L (12-BUS)" option. The background shows the same interface as the previous screenshot, but with the "Fiscal Year" set to 2018.

PCT: CREATION (CONTINUED)

- When you select the Pay Period End Date, the posted payroll will appear in a PCT Worksheet for edits.
- The Pay Period End Date drop down is controlled by existing posted records for the employee.
- Each employee's list of pay dates is a representative of only their personal payrolls.
- Original Posted Payroll appears grayed out
- Below the Original Posted Payroll, a line is presented allowing entry of data to certain fields:
 - Account (CC/SL/SA)
 - Percentage, Hours (for hourly employees only) & Salary

Canopy
The Texas A&M University System CanopyTraining (PAL)

Campus: TX A&M AGRILIFE EXTENSION SRVC (07) Fiscal Year: 2017 Set ODIFY Logout

EPA PCT FFX FRS Buy A&M Routing System

Main Menu PCT Payroll Cost Transfer Worksheet HELP? Send Feedback

Payroll Cost Transfer Worksheet Payroll Cost Transfer Document Payroll Cost Transfer Document Search

UIN/Name: Search Fiscal Year: 2017 Select a Pay Period End Date: 03/31/2017 Worksheet Mode Clear Document

BPP Name Search

Name: Frank, Maureen G UIN: 118-00-6603 Payroll Pay Period End Date: 03/31/2017
Doc Campus: 07 Doc FY: 2017

PAYROLL COST TRANSFER WORKSHEET

BPP | PIN-X05712 | ADLOC-07154000 | TITLE-7128 ASSISTANT PROFESSOR & EXTENSION SPECIALIST | Regular

CC	SL	SA	OBJ	AA	Pct	Hrs	Salary/Wages	Benefits
07	154000	27000	1211	0100	52.34	0.00	3271.25	583.11
07	154000	27000	1211	0100	0	0	0	0
07	154000	49411	1211	0100	31.77	0.00	1985.63	353.94
07	154000	49411	1211	0100	0	0	0	0
07	154000	97000	1211	3100	15.89	0.00	993.13	213.09
07	154000	97000	1211	3100	0	0	0	0

PCT: HOW TO ROUTE CREATED DOCUMENT

- Enter the Description
- Choose a Justification Code
- Click Save

The screenshot displays the Canopy PCT interface for a Payroll Cost Transfer Document. The document ID is CTA AAAA (PCT Report) for DOC FY: 2017. The document name is Frank, Maureen G. The description is PAYROLL CORRECTION, and the justification code is SPECIAL UNIQUE EVENT/PROJECT (EP). The document is currently in the 'In Process (IP)' status.

Key interface elements and actions indicated by red arrows:

- Messages:** A yellow banner at the top indicates "Record has been successfully modified (Message: 0003)".
- Save Header Changes:** A button located to the right of the document header information.
- Update Cost Transfer:** A button located below the 'Original Payroll Record' table, which is used to return to the worksheet.

The interface includes several summary tables:

Campus Code	Account	Obj	AcctAnalysis	Project/Task	Salary/Wage Amt	Benefit Amt	Hrs/Pct
07	154000-27000	1211	0100		\$3,278.55	\$153.11 0.00	
07	154000-49411	1211	0100		\$1,995.52	\$252.94 0.00	
07	154000-97000	1211	3100		\$993.13	\$213.09 0.00	
Grand Total:					\$6,250.01		

Campus Code	Account	Obj	AcctAnalysis	Project/Task	Salary/Wage Amt	Benefit Amt	Hrs/Pct
07	154000-27000	1211	0100	154000 27100	(\$1,562.50)	(\$278.52) 0.00	
07	154000-27000	1211	0100		\$1,562.50	\$278.52 0.00	
Grand Total:					\$0.00		

Campus Code	Account	Obj	AcctAnalysis	Project/Task	Salary/Wage Amt	Benefit Amt	Hrs/Pct
07	154000-27000	1211	0100		\$1,708.75	\$304.59 0.00	
07	154000-49411	1211	0100		\$1,985.52	\$353.94 0.00	
07	154000-97000	1211	3100		\$993.13	\$213.09 0.00	
07	154000-27000	1211	0100		\$1,562.50	\$278.52 0.00	
Grand Total:					\$6,250.01		

At the bottom of the page, there are sections for 'Payroll Change Details' (No records found to display), 'Completed FYIs Recipient' (There are no FYIs for this document), and 'Document Notes' (There are no notes for this document).

PCT: HOW TO ROUTE CREATED DOCUMENT (CONTINUED)

When changes are complete, the PCT should be submitted into Routing for approvals by clicking the Action Dropdown and selecting Close and Route.

Canopy
The Texas A&M University System **CanopyTraining (PAL)**
Campus: TEXAS A&M UNIVERSITY (02) Fiscal Year: 2017 Set CO/FY Logout

PCT FFX FRS Buy A&M Routing System

Main Menu ▾ PCT ▾ Payroll Cost Transfer Document HELP? Send Feedback

Payroll Cost Transfer Worksheet Payroll Cost Transfer Document Payroll Cost Transfer Document Search

Payroll Transfer Document: CTAAAAI Action: Select an action...
Submit

HEADER - Record has been successfully modified

ROLL COST TRANSFER REQUEST

Document ID: CTAAAAI (PCT Report) DOC FY: 2017 DOC Status: In Process (IP)
Name: Frank, Maureen G UIN: 118-00-6603 PAYROLL Pay Period End Date: 03/31/2017
Route Document:

Once submitted into Routing, the Route Document Field will be populated.

Canopy
The Texas A&M University System **CanopyTraining (PAL)**
Campus: TEXAS A&M UNIVERSITY (02) Fiscal Year: 2017 Set CO/FY Logout

PCT FFX FRS Buy A&M Routing System

Main Menu ▾ PCT ▾ Payroll Cost Transfer Document HELP? Send Feedback

Payroll Cost Transfer Worksheet Payroll Cost Transfer Document Payroll Cost Transfer Document Search

Payroll Transfer Document: CTAAAAI Action: Select an action...
Submit

PAYROLL COST TRANSFER REQUEST

Document ID: CTAAAAI (PCT Report) DOC FY: 2017 DOC Status: Closed (CL)
Name: Frank, Maureen G UIN: 118-00-6603 PAYROLL Pay Period End Date: 03/31/2017
Route Document: ECT07CTAAAAI Route Status: In Dept Rt (DR)
Description: PAYROLL CORRECTION
Justification Code: SPECIAL UNIQUE EVENT/PROJECT (EP)
Created By: Hall, Wendy T (10/02/2017)
Last Update By: Hall, Wendy T (10/02/2017)
Attachments:

PCT: REVIEWING AND APPROVING A DOCUMENT

- Click on the Routing tab at the top left-hand side.
- Next, click on the document number.

Canopy Routing Inbox

Canopy The Texas A&M University System

Campus: TEXAS A&M TRANSPORTATION INSTI (12) Fiscal Year: 2018 Set CDFY Logout

Main Menu - Routing - Inbox

Inbox Enroute Outbox

Document: ECT12CTAAAQ

Approval Only: Yes No

Submit

Global Queue Search for Substitute: Search

Manual Only: Yes No

SEND FEEDBACK

INBOX CONTENT (Total Items: 1) DEFAULT VIEW

Document	Action	Status	Arrival Date	Summary	Account	Total	Creator	Create Date	Quick Action
ECT12CTAAAQ	Approve	In Proc Rt	01/22/2018	C-RENDE	497000-00098	\$32.00	Buckhaults, Patti L	01/22/2018	Approve

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

Canopy is a Business Computing Services application. The Texas A&M University System Version: 01/20/2018 10:30:30 Top of Page

- Review the document.
- If all is well, select Approve from the Routing Action Dropdown menu and click Submit

Canopy Routing Document

Canopy The Texas A&M University System

Campus: TEXAS A&M TRANSPORTATION INSTI (12) Fiscal Year: 2018 Set CDFY Logout

Main Menu - Routing - Document

Inbox Enroute Outbox Document Global Queue User Profile

Document: ECT12CTAAAQ Routing Action: Select an action

Approve

REJECT TO CREATOR (REJ)

APPROVE & ROUTE (APR)

APPROVE & ROUTE FOR APP (APR-FIA)

ROUTE FOR APP AND RETURN (FRM)

PUT DOCUMENT ON HOLD (HLD)

SEND INFORMATION COPY (PIC)

DOC ID: ECT12CTAAAQ DOC FY: 2018 DOC Status: Closed (CL)

Name: Rende, Steal C UIN: 424-00-9182 Pay Period End Date: 09/23/2017

Route Status: In Proc Rt (PR)

Route Document: ECT12CTAAAQ (Routing Document Report)

Description: TEST

Justification Code: SPECIAL INQUIRE EVERY PROJECT (EP)

Created By: Buckhaults, Patti L (01/22/2018)

Last Update By: Buckhaults, Patti L (01/22/2018)

Attachments:

Name	Added Date	Added By	Deleted Date	Deleted By
NO ATTACHMENTS FOUND				

ADD ATTACHMENTS

EDIT

ORIGINAL PAYROLL RECORD (Total Items: 1)

Campus Code	Account	Obj	AccAnalysis	Salary/Wages Amt	Benefit Amt	Hrs/Pct
12	119200-0000	3740	0001	\$190.00		\$0.36 24.75 HRS
Grand Total:				\$190.00		\$0.36 24.75 HRS

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

PAYROLL WORKSHEET RECAP OVERVIEW

Campus Code	Account	Obj	AccAnalysis	Salary/Wages Amt	Benefit Amt	Hrs/Pct
12	119200-0000	3740	0001	\$190.00		\$0.36 24.75 HRS
12	897000-00038	3740	5012	\$32.00		\$0.09 4.00 HRS
Grand Total:				\$222.00		\$0.45 28.75 HRS

prev 1 next Page 1 of 1 Go Page size: 2 Change (Showing page 1 of 1, Items 1-2) Total Items: 2

PAYROLL SUMMARY

Campus Code	Account	Obj	AccAnalysis	Salary/Wages Amt	Benefit Amt	Hrs/Pct
12	119200-0000	3740	0001	\$190.00		\$0.36 24.75 HRS
12	897000-00038	3740	5012	\$32.00		\$0.09 4.00 HRS
Grand Total:				\$222.00		\$0.45 28.75 HRS

prev 1 next Page 1 of 1 Go Page size: 2 Change (Showing page 1 of 1, Items 1-2) Total Items: 2

PAYROLL CHANGE DETAILS (Total Items: 2)

CONTACTS

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